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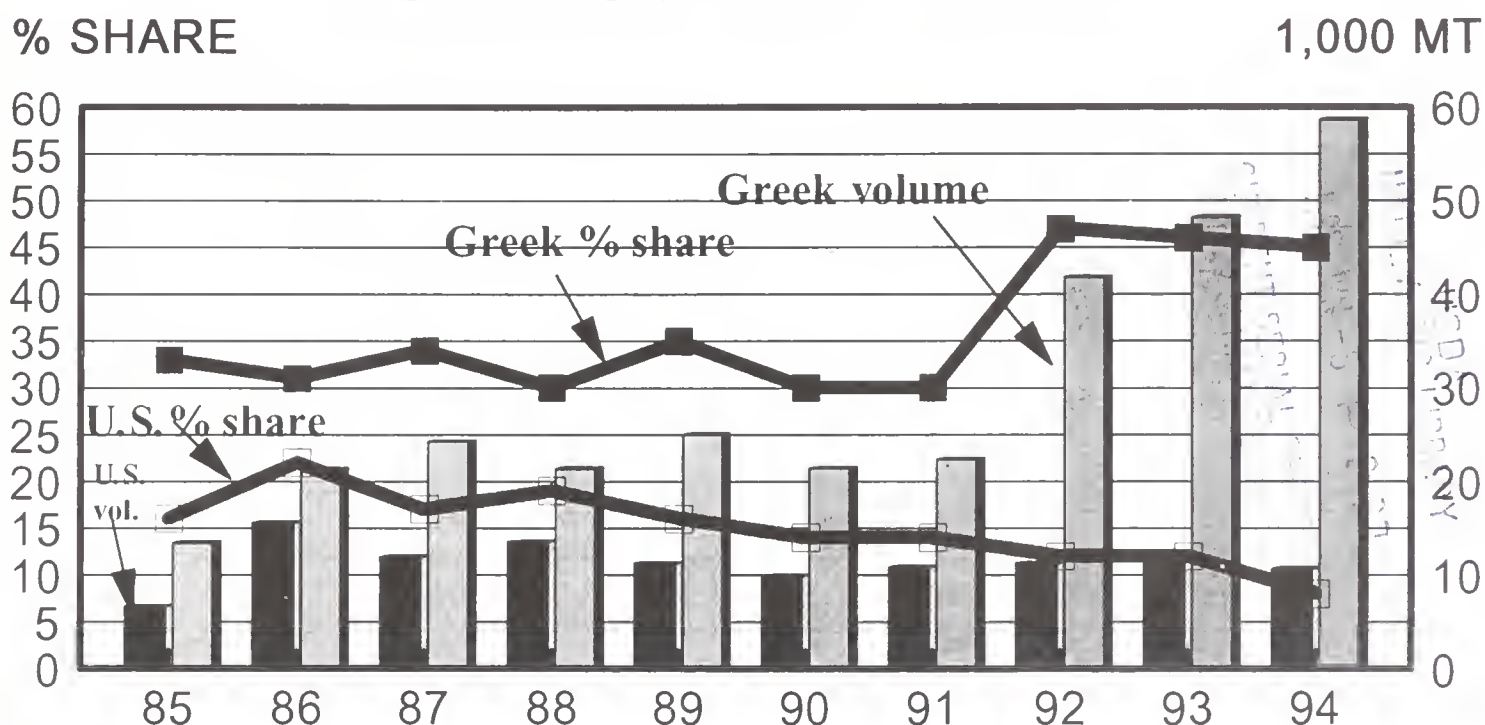
United States  
Department of  
Agriculture

Foreign  
Agricultural  
Service

Circular Series  
FHORT 5-95  
May 1995

# World Horticultural Trade & U.S. Export Opportunities

## GREEK PRODUCT HAS DISPLACED U.S. CANNED PEACHES IN STRATEGIC EXPORT MARKETS



Source: Import data from Canada (StatsCan), Mexico (SECOFI), and Japan (Customs).  
1/ Market share expressed as percentage; volume, in thousand metric tons.

The last eight years have witnessed the inexorable decline of U.S. canned peaches in important export markets. The chart above shows that the U.S. industry has lost both share and volume in the combined markets of Canada, Japan, and Mexico. Erosion has occurred despite the fact that these dynamic markets have doubled imports since the start of the 1990s, and NAFTA was implemented in 1994. Increased shipments of heavily subsidized Greek product, particularly since 1991, are the primary reason for this displacement, although China has recently made significant inroads in Japan. In calendar 1994, the U.S. position in these key markets had dropped to eight percent, about half the level of only five years ago. During the same period, Greece's share has climbed from 35 percent to 45 percent, while export volume has rocketed from 25,000 tons to almost 59,000 tons. Prospects for the U.S. industry in 1995 are mixed, due to Mexico's financial problems and Greece's enormous exportable supplies from the record 1994 pack. In the longer term, the U.S. industry is concerned about increased competition from the proposed free trade agreement with Chile. (For details on the canned deciduous fruit situation, see page 20)

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### **ANALYSIS**

Casey Bean	202-720-4620	Fresh deciduous fruit, apple juice, olives,
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Bill Janis	202-720-0897	Fresh and processed potatoes, tree nuts, tropical fruits
Ross Kreamer	202-720-9903	Canned deciduous fruit, wine, brandy, table grapes, kiwifruit, NAFTA, PL-480, and GSM-102 export credits
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, melons, bananas, nursery products, and cut flowers
Stephanie Riddick	202-720-9792	Dried fruit, avocados, beer, hops, and berries
Samuel Rosa	202-720-9792	Sugar, fresh citrus and juices, honey, mushrooms, and CBI
Joe Somers	202-720-2974	Situation and outlook group leader, fresh and processed citrus, trade forecasts, FAO citrus liaison, and circular editor
Mark Thompson	202-720-6877	Cross-commodity issues and special projects

### **MARKETING**

Jayne Carbone	202-720-0911	Citrus and processed fruit
Laura Davis	202-720-2252	Deciduous fruit
Ted Goldammer	202-720-8498	Wine, brandy, hops, and potatoes
Stacey Peckins	202-720-5330	Tree nuts, avocados, papaya, foliage, and plants
Elise Pinkow	202-690-1341	Table grapes, grape juice, cranberry juice, and berries
Steve Shnitzler	202-720-8495	Dried fruit, kiwifruit, and ginseng

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### Export Summary

U.S. exports of horticultural products to all countries in February 1995 totaled \$726.8 million, 33 percent above the same month a year earlier. All categories registered increases in February except for non citrus fresh fruit and ginseng. Categories with the most significant increases in February were tree nuts (up \$34.5 million or 46 percent); fruit and vegetable juices (up \$29.2 million or 87 percent); beer (up \$19.7 million or 109 percent); fresh vegetables (up \$18.6 million or 28 percent); and fresh citrus (up \$17.9 million or 26 percent). During the first five months (October-February) of fiscal 1995, the total value of U.S. horticultural exports was \$3.9 billion -- 23 percent over the same period last year.

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All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds,  
1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon,  
1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

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U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES  
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR  
FEB 95

NAME		QUANTITY				VALUE (1,000 DOLLARS)					
GROUP	& COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TDATE LAST YR	YR TDATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR, FRUIT CITRUS	MT										
	GRAPEFRUIT	70,318	77,050	225,231	267,120	461,577	34,982	36,930	113,607	129,974	228,387
	LEMONS	10,533	12,091	59,879	54,311	124,410	6,348	9,437	48,726	47,954	108,711
	ORANGES, INCL TMLPS	50,783	69,518	176,229	207,883	543,324	25,341	37,743	96,870	111,706	291,021
	OTHER CITRUS	3,703	3,604	13,821	15,887	26,939	2,711	3,124	11,721	14,032	20,325
	Subtotal:----	135,338	162,264	475,161	545,203	1,155,652	69,383	87,236	270,925	303,668	648,447
FR, FRT, NON-CIT	MT										
	APPLES	52,564	49,783	321,213	363,378	662,897	33,009	31,759	198,143	217,679	404,229
	AVOCADOS	405	1,930	2,401	5,654	8,923	416	1,632	2,388	4,723	11,337
	CHERRIES SWT & TRT	15	137	1,462	5,655	30,841	37	1,130	2,334	4,723	11,337
	GRAPES	1,248	648	91,551	92,627	215,510	1,487	943	104,287	113,752	244,148
	KIWI FRUIT	1,548	1,328	4,930	92,094	8,748	2,245	1,963	7,127	6,939	13,091
	MELONS	3,194	3,790	23,499	23,666	218,603	2,407	2,494	13,971	19,807	82,261
	PAPAYA	544	607	2,091	3,664	7,759	1,064	1,287	5,910	7,047	14,547
	PEACHES & NCTRNS	710	520	2,923	3,848	83,306	699	567	2,589	3,223	65,914
	PEARS	9,703	9,475	69,477	85,457	137,040	5,186	5,337	38,448	44,356	74,043
	PLUMS/PRUNES	314	308	3,138	3,372	69,918	2,345	2,332	2,795	4,326	56,882
	STRAWBERRIES	1,743	1,255	8,300	7,406	57,107	3,307	2,618	20,665	20,185	94,942
	OTHER NON-CITRUS	1,445	1,389	18,307	15,861	55,521	1,356	1,126	16,942	17,078	60,348
	Subtotal:----	73,437	71,174	549,397	613,688	1,555,979	51,562	50,394	413,605	453,890	1,252,616
CND/PRP FRUIT	MT										
	CHERRIES TRT CND	250	467	1,947	2,475	5,656	417	797	3,440	4,282	10,117
	FRUIT MIXTURES	2,005	1,961	11,198	13,116	26,348	2,547	2,260	13,364	15,104	30,536
	MARACHINO CHRY	308	239	2,014	7,995	4,685	372	288	13,983	4,215	9,003
	PEACHES CANNED	1,425	1,539	7,552	7,039	18,173	1,523	1,403	7,266	6,387	17,798
	PINEAPPLE CANNED	278	238	1,801	1,387	4,156	249	211	1,619	1,178	3,659
	FRT PRP/PRES	4,568	5,354	25,018	30,637	64,995	5,314	6,168	29,075	33,565	74,638
	OTHER CANNED FR	2,463	4,935	11,958	16,434	43,183	2,150	4,418	11,068	15,351	38,088
	Subtotal:----	11,301	14,736	61,489	73,088	167,199	12,675	15,747	69,819	80,085	183,843
DRIED FRUIT	MT										
	PRUNES, DRIED	4,239	5,504	26,761	27,504	57,923	10,391	12,229	60,536	64,001	137,199
	RAISINS, DRIED	8,645	9,550	51,438	50,847	122,625	13,713	15,673	80,211	82,885	195,347
	OTHER DRIED FRUIT	1,313	1,148	9,458	11,233	20,739	3,702	3,577	24,810	26,765	51,362
	Subtotal:----	14,197	16,203	87,658	89,585	201,288	27,807	31,479	165,557	173,651	383,909
FROZEN FRUIT	MT										
	BLUEBERRIES, FZN	742	739	2,326	2,688	7,104	1,182	1,097	3,647	3,924	10,616
	STRAWBERRIES, FZN	1,174	2,624	7,934	11,111	27,248	1,645	3,489	10,520	14,361	34,765
	OTHER FZN FRUIT	537	1,525	4,259	5,979	15,317	840	2,204	6,900	9,103	23,995
	Subtotal:----	2,455	4,889	14,520	19,778	49,670	3,668	6,791	21,068	27,388	69,377
FRT&VEG JUICE (SSE)	KL										
	GRAPEFRUIT JU CNC	2,326	5,936	8,634	20,569	37,622	2,458	4,137	7,620	13,916	33,808
	ORANGE JU NT CNC	7,284	16,014	41,725	69,831	127,494	4,857	10,927	28,502	46,083	84,553
	ORANGE JUICE CNC	14,066	26,017	78,842	100,572	268,785	9,495	21,460	49,046	63,126	149,035
	OTHER JUICES	22,683	31,032	125,242	149,302	262,485	16,648	26,091	84,017	112,248	248,341
	Subtotal:----	46,361	79,000	254,445	340,276	796,387	33,460	62,616	169,187	235,374	515,738
VEGETABLES FR	MT										
	ASPARAGUS, FR, CHLD	1,883	2,773	3,264	4,508	21,980	7,948	10,618	13,272	17,415	71,547
	BROCCOLI	12,880	9,080	55,061	45,388	128,764	7,862	6,649	33,855	36,666	80,197
	CAULIFLOWER	8,193	7,130	39,546	40,993	94,794	5,086	4,839	25,539	29,974	61,798
	CELERY	10,291	8,775	53,287	50,170	117,643	2,714	5,482	17,499	26,346	37,955
	LETTUCE, FR, CH.	23,786	25,776	139,323	133,606	309,932	9,527	10,361	54,617	83,175	126,426
	ONIONS, FR	4,661	21,210	50,825	196,909	193,828	2,898	8,414	22,863	63,772	69,757
	PEPPERS	3,301	2,911	20,790	20,899	52,747	2,433	3,582	17,704	21,499	44,884
	TOMATOES, FR, CH.	9,305	7,542	55,804	58,732	148,517	6,168	6,659	51,334	53,592	114,143
	OTHER VEG, FR	34,167	43,639	188,804	243,222	686,139	21,081	27,715	130,495	155,749	361,952
	Subtotal:----	108,470	128,840	606,709	794,430	1,754,349	65,721	84,323	367,182	488,192	968,665
VEGETABLES CANNED	MT										
	CATSUP & CHILI SA	2,632	3,018	10,352	17,958	31,335	2,014	2,193	8,930	12,745	24,793
	SWEET CORN CANNED	12,173	12,553	72,283	68,787	150,029	9,439	10,578	50,032	58,508	121,698
	TOMATO PASTE	4,523	10,238	32,478	43,264	76,150	3,690	8,524	26,952	35,079	63,088
	TOMATO SAUCE	5,561	7,048	30,581	35,240	80,996	5,921	6,700	31,616	33,598	79,832
	OTHER CANNED VEG.	14,722	16,833	85,197	90,258	206,930	17,474	20,541	106,637	110,174	249,921
	Subtotal:----	39,613	49,692	230,893	255,509	545,443	38,541	48,538	231,169	250,106	539,334
FROZEN VEGETABLES	MT										
	FROZEN FRENCH FRY	18,775	31,120	96,820	134,705	246,544	13,851	23,814	69,075	101,233	178,026
	FZN SWT CORN	4,035	5,793	27,121	31,673	62,340	3,564	4,620	23,895	27,664	55,228
	OTHER POT, FZN	1,092	1,589	8,739	8,564	19,930	805	1,442	2,114	6,999	15,985
	OTHER FZN VEG	3,905	5,595	22,148	28,578	55,286	3,571	4,788	20,716	25,332	53,023
	Subtotal:----	27,809	44,098	154,829	203,521	384,101	21,792	34,665	120,801	161,230	302,264
DEHYD VEGETABLES	MT										
	GARLIC DEHY	571	589	3,106	3,223	8,031	1,442	1,402	7,556	7,686	19,224
	ONIONS DEHY	2,041	2,797	10,925	16,902	28,721	4,876	6,753	24,642	31,710	61,580
	POTATO DEHYD	3,746	5,566	16,770	21,383	41,546	3,884	5,621	17,391	21,932	43,652
	OTHER DEHY VEG.	2,951	2,981	11,377	20,163	29,725	3,391	5,770	23,718	32,426	57,923
	Subtotal:----	9,311	11,935	42,180	61,673	108,024	15,595	19,548	73,308	93,815	181,980
TREE NUTS	MT										
	ALMND SH/PRP	10,783	24,878	76,187	107,972	166,886	51,820	81,614	351,648	349,647	729,695
	ALMONDS, UNSHLD	873	1,245	6,130	8,865	15,261	2,410	3,334	16,275	22,826	40,108
	PISTACHIO, UNSHLD	732	1,207	4,433	7,091	10,469	1,834	3,215	12,695	19,003	29,952
	WALNUTS, SHLD	945	1,696	12,348	17,375	20,192	4,284	5,846	41,508	55,636	71,786
	WALNUTS, UNSHLD	883	1,181	38,619	47,186	45,510	1,639	2,800	74,093	75,306	85,436
	OTHER NUTS	3,770	5,112	30,894	32,315	58,684	12,230	12,500	90,268	81,777	172,087
	Subtotal:----	17,989	35,322	168,614	216,807	317,005	74,221	108,712	586,490	585,397	1,129,127
NURSERY PRODUCTS	NONE										
	CUT FLOWERS	0	0	0	0	0	3,276	2,979	15,523	13,992	38,587
	OTHER NURSERY	0	0	0	0	0	12,883	14,986	59,387	69,382	153,273
	Subtotal:----	0	0	0	0	0	16,159	17,966	74,910	83,374	191,860
HOPS & PRODUCTS	MT										
	HOP EXTRACT	717	601	2,812	2,297	5,400	7,162	9,939	35,245	39,910	62,297
	HOP PELLETS	530	257	1,721	3,837	4,162	2,418	1,339	9,651	22,504	23,218
	HOPS, NSFP	205	302	1,113	1,942	1,976	1,355	2,263	6,585	12,146	11,412
	Subtotal:----	1,453	1,161	5,646	8,078	11,539	10,936	13,543	51,482	74,562	96,929
WINE	KL										
	GRAPE WINES	7,004	9,862	41,692	45,829	116,815	10,686	15,976	62,941	73,369	172,684
	OTHER WINE PRODUCTS	393	1,037	5,214	5,730	13,398	753	1,256	4,431	6,179	13,847
	Subtotal:----	7,397	10,900	46,907	51,560	130,213	11,439	17,233	67,373	79,548	186,531
MISCELLANEOUS	KL										
	BEER & BEVERAGES	27,575	61,022	143,205	292,320	598,932	17,964	37,630	86,976	176,067	373,685
	EDIBLE PREPARATIONS	11,519	14,707	58,652	84,004	160,298	43,559	48,406	207,932	409,026	571,798
	GINSENG	50	22	611	690	933	4,350	2,588	56,309	49,989	77,148
	POTATO CHIPS	3,864	6,732	22,935	34,903	60,907	10,212	17,520	62,790	94,467	174,576
	OTHER MISC.	0	0	0	0	0	16,447	21,841	31,219	109,094	250,246
	Subtotal:----	43,009	82,484	225,406	411,919	821,071	92,534	127,987	505,228	838,645	1,447,455</

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES  
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR  
FEB 95

NAME		QUANTITY					VALUE (1,000 DOLLARS)				
GROUP	COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TDATE LAST YR	YR TDATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT	MT										
	APPLES	3,073	3,890	17,475	29,224	106,059	1,617	1,875	8,331	10,542	76,188
	AVOCADO	197	500	6,588	17,014	14,211	160	175	3,996	16,610	12,538
	BANANA	252,347	272,735	1,403,592	1,504,623	3,643,279	65,820	77,889	374,616	412,390	983,322
	CANTELOUPE	27,208	36,691	91,798	108,265	224,836	7,803	11,356	27,658	31,215	67,706
	GRAPE	65,176	75,501	135,059	155,115	311,027	47,531	58,190	106,167	127,042	251,625
	KIWI FRUIT	187	109	1,538	489	29,335	106	76	1,402	364	17,612
	MANGO	1,532	1,936	6,419	10,472	121,250	1,507	1,669	7,777	10,658	93,477
	PEACH	12,655	14,725	38,293	41,389	43,118	8,464	3,280	24,642	26,472	27,816
	PEAR	18,138	8,624	20,859	10,216	65,283	7,074	3,881	11,768	7,304	33,073
	PINEAPPLE	8,398	9,309	44,727	48,085	126,505	2,941	3,487	15,898	15,847	40,775
	STRAWBERRY	13,852	14,320	54,104	53,376	20,102	3,900	5,008	12,011	14,027	35,038
	OTHER MELON	41,957	55,063	205,071	262,194	547,710	19,594	22,054	99,150	109,671	243,414
	OTHER FRUIT	446,284	496,132	2,030,748	2,246,723	5,367,691	171,595	201,959	713,394	799,949	1,924,220
	Subtotal:----										
DRIED FRUIT	MT										
	DRD APRICOT	929	1,057	4,746	7,133	10,400	2,570	1,731	12,203	11,002	23,920
	DRD FIG & PASTE	1,267	1,866	5,608	6,946	11,732	1,349	1,881	7,303	8,395	15,131
	OTHER DRD FRUIT	1,683	1,598	11,211	10,064	27,141	2,455	2,242	16,502	14,691	40,093
	Subtotal:----	3,881	4,522	21,567	24,144	49,274	6,375	5,854	36,008	34,089	79,145
FROZEN FRUIT	MT										
	FZN BLUEBERRIES	1,086	377	2,901	3,515	8,242	1,434	474	4,058	4,819	11,967
	FZN STR	1,319	4,196	3,158	8,195	18,949	1,414	4,083	3,952	8,674	19,766
	OTHER FZN FRUIT	3,181	2,307	12,795	10,818	34,646	3,707	2,717	13,720	12,722	40,152
	Subtotal:----	5,587	6,881	18,854	22,529	61,838	6,557	7,275	21,731	26,216	71,887
CANNED/PREP FRUIT	MT										
	CANNED OLIVES	3,684	5,181	29,002	25,907	70,223	8,170	13,316	60,404	63,731	152,061
	CANNED ORANGES	4,125	5,072	16,370	17,880	52,281	3,184	4,819	13,191	15,161	41,356
	CANNED PEACH	887	1,172	11,762	9,810	22,684	520	714	6,479	5,642	12,665
	CANNED PINEAPPLE	29,728	25,737	135,357	129,259	330,958	16,131	12,591	76,480	62,517	178,064
	MIXED FRUIT	3,297	3,133	20,324	18,881	36,254	2,575	2,394	17,090	13,871	30,687
	PREP/PRES FRUIT	3,958	4,416	23,028	24,896	60,832	4,882	5,387	26,017	29,947	67,856
	OTHER CANNED FRUIT	3,848	5,012	22,354	23,299	56,995	5,332	6,475	29,549	30,816	72,954
	Subtotal:----	49,531	49,726	258,198	249,935	630,131	40,797	45,700	229,213	221,688	555,644
FRT&VEG JUICE (SSE)	KL										
	APPLE JUICE	50,253	64,352	358,597	359,310	1,018,486	9,315	16,971	71,210	82,577	184,639
	FCOJ	124,367	97,478	736,464	570,447	1,592,083	24,053	21,685	144,677	108,257	311,967
	GRAPE JU	2,420	1,203	25,774	21,530	71,848	1,296	470	9,019	7,700	27,588
	PINAP JU	28,913	34,435	133,494	127,493	287,725	6,066	6,673	29,914	24,461	61,809
	OTHER FRUIT JUICES	14,007	17,126	85,306	88,654	230,804	8,105	6,696	41,864	46,014	103,032
	Subtotal:----	219,962	214,596	1,339,637	1,167,437	3,200,947	48,837	52,498	296,686	269,011	689,037
FRESH VEGETABLES	MT										
	GARLIC	2,620	1,694	15,214	5,124	31,117	2,400	2,225	9,016	6,903	24,827
	ASPARAGUS	3,807	6,963	13,843	19,801	27,711	6,724	12,030	21,218	32,694	41,829
	BELL PEPPER	21,389	27,944	66,185	71,711	121,842	19,782	33,326	69,077	95,932	142,760
	CARROTS	4,305	5,485	37,223	57,369	60,094	969	1,553	8,617	15,659	15,433
	CHILLI PEPPER	4,709	8,049	16,017	27,076	43,897	4,983	8,227	19,938	31,079	43,110
	CUCUMBER	51,695	42,529	160,318	142,660	250,972	22,173	26,758	71,582	85,832	106,902
	ONIONS	36,700	24,921	101,105	78,337	254,652	22,419	12,079	62,507	59,545	136,642
	POTATO, INCL SD	35,523	22,976	147,248	97,118	317,308	8,128	4,206	32,130	19,100	70,644
	SQUASH	16,101	18,223	61,965	67,181	101,869	9,413	14,723	34,963	53,398	58,123
	TOMATOES	62,922	91,754	176,576	215,707	401,875	89,630	86,584	189,520	195,548	328,154
	OTHER FRESH VEGETAB	29,681	42,568	123,764	163,380	281,345	19,225	30,245	77,438	112,001	164,712
	Subtotal:----	269,456	293,112	919,464	945,469	1,892,688	205,851	231,961	596,009	707,697	1,133,140
CANNED/DEHYD VEGET	MT										
	CND ARTICHOKE	1,610	839	4,527	4,508	30,548	2,562	1,409	7,246	8,327	53,543
	CANNED BAMBOO	1,936	1,624	14,780	12,993	29,691	1,680	1,326	11,578	10,022	23,548
	CND MSHROOMS	5,358	6,214	19,546	23,951	64,543	9,376	13,760	39,153	58,613	132,677
	CND PIMIENTO	527	456	3,051	3,836	6,649	550	645	3,559	5,468	8,273
	CND TOM	1,728	2,722	15,291	20,261	45,118	651	925	5,310	7,191	16,746
	CANNED WATERCHESTNU	2,745	2,040	9,672	8,857	39,849	1,945	1,424	7,290	6,967	27,363
	TOMATO PASTE & SAUC	1,298	3,699	7,606	16,827	61,941	1,140	2,692	4,954	12,700	43,217
	DRIED MUSHROOMS	130	181	602	929	1,554	1,457	1,547	7,342	9,471	16,994
	DRIED TOMATOES	271	313	3,028	2,134	5,957	999	1,187	11,129	7,962	22,770
	OTHER DEHYD VEGETAB	5,136	10,982	39,316	46,198	90,749	4,262	6,393	25,378	30,147	60,302
	OTHER CANNED VEGETA	16,610	19,924	82,435	101,386	207,565	16,873	20,212	85,938	103,972	211,430
	Subtotal:----	37,353	48,999	199,857	241,886	584,168	41,499	51,526	208,881	260,846	616,866
FROZEN VEGETABLES	MT										
	BROCCOLI FZN	14,070	19,229	53,086	73,749	130,634	9,901	11,817	36,793	46,189	87,418
	CAULIFLOWER FZN	3,806	2,345	23,710	20,200	29,523	2,997	1,702	20,507	12,711	24,636
	POTATO FZN	10,611	11,349	52,581	64,819	130,215	6,110	7,079	29,331	37,915	72,129
	OTHER VEG FZN	218,890	223,231	688,857	1,062,904	2,582,515	9,090	8,962	40,719	43,501	105,616
	Subtotal:----	247,377	256,156	818,236	1,221,673	2,872,889	28,099	29,560	127,351	140,316	289,800
TREE NUTS	MT										
	BRAZILS TOT	260	111	2,942	2,783	11,720	504	309	6,325	6,806	19,757
	CASHEWS TOT	4,783	4,118	26,655	23,200	64,366	20,924	18,120	111,424	101,710	280,857
	COCONUT	4,109	3,402	28,869	22,181	68,463	3,385	2,589	23,177	17,644	56,557
	PECANS	2,168	1,678	6,512	20,590	13,178	3,668	5,399	15,889	48,799	32,545
	OTHER NUTS	714	1,177	9,862	10,983	17,689	2,554	4,943	33,610	41,668	64,870
	Subtotal:----	12,036	10,487	74,842	79,740	175,419	31,037	31,362	190,428	216,629	454,587
NURSERY PRODUCTS	M										
	CARNATIONS	82,043	98,007	455,171	494,713	1,057,314	7,188	8,554	38,424	42,478	88,833
	CHRISTMAS TREES	38	0	2,024	2,012	2,029	24	0	17,066	17,250	17,116
	CHRYSANTHEMUMS	46,643	46,456	215,226	253,017	562,356	4,300	5,033	29,398	27,468	66,608
	ROSES	100,218	123,353	303,700	331,795	677,762	21,379	26,643	55,414	62,782	124,203
	TULIP BULBS	0	0	64,784	77,694	302,490	0	0	7,804	9,487	34,441
	OTHER CUT FLOWERS	0	0	0	0	0	12,551	15,453	50,281	59,394	122,628
	OTHER NURSERY PRODU	0	0	0	0	0	17,922	23,863	97,837	116,936	226,569
	Subtotal:----	228,943	267,817	1,040,907	1,159,234	2,601,952	63,367	79,547	296,227	335,798	680,401
HOPS & PRODUCTS	MT										
	HOPS & PELLETS	1,329	1,036	4,037	4,292	5,291	8,751	7,257	25,706	28,720	33,104
	OTHER HOP PRODS	216	200	464	476	703	1,180	1,223	2,743	2,902	4,251
	Subtotal:----	1,546	1,236	4,502	4,769	5,995	9,932	8,480	28,450	31,623	37,356
WINE	KL										
	RED WINE	6,557	8,014	44,769	51,073	113,743	20,799	30,758	155,575	186,328	386,908
	SPARKLING WINE	1,050	1,288	17,050	16,155	31,087	10,617	11,673	140,634	135,156	276,616
	WHITE WINE	5,898	5,740	40,561	39,780	100,106	17,200	17,005	120,307	126,020	293,701
	OTHER WINE PRODUCTS	0	0	0	0	0	4,061	4,025	29,762	32,049	72,239
	Subtotal:----	13,506	15,043	102,381	107,010	244,937	52,679	63,462	446,280	479,555	1,029,466
MISCELLANEOUS	KL										
	BEER & BEVERAGES	84,282	95,216	456,732	480,982	1,320,904	68,056	77,898	373,105	401,296	1,083,435
	OTHER MISC.	0	0	0	0	0	53,077	61,318	312,384	335,614	779,176
	Subtotal:----	84,282	95,216	456,732							

## EXPORT NEWS AND OPPORTUNITIES

### GSM-102 credit guarantee program quiet since last report

No activity was noted in the GSM-102 program since the April 1995 report. Thus far in FY 1995, a total of \$29.5 million has been allocated for coverage of horticultural commodities and products (see table, below). Under the GSM-102 credit guarantee program, repayment terms are usually three years. For example, through this program, the U.S. exporter can be paid by the U.S. bank immediately upon export if an irrevocable Letter of Credit is opened by the importer's bank and financed by the U.S. bank. The importer's bank then has up to three years to repay the U.S. bank. A slightly different approach has been specified for the FY 1995 program for Russia, which offers coverage only on 90-day terms. These repayment terms are also available for Mexico. (For further information on the GSM-102 program for horticultural commodities, contact Ross G. Kreamer, 202-720-9903.)

#### FY 1995 GSM-102 Credit Guarantee Coverage 1/

Country/ Commodity	Announced Allocations FY 1995 (\$1,000)	Exporter Applications Approved (\$1,000)	Balance (\$1,000)
<b>China</b>			
Hops	6,000	0	6,000
<b>Indonesia</b>			
Potatoes 2/	2,000	0	2,000
<b>Mexico</b>			
Fresh Fruits 3/	5,000	0	5,000
Hops	5,000	2,300	2,700
<b>Russia 4/</b>	9,500	0	9,500
<b>Tunisia</b>			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
<b>Andean Region 5/</b>			
Tree Nuts and Fresh Fruits 6/	1,000	0	1,000

1/ Coverage announced through April 7, 1995.

2/ Cut and frozen for french fries.

3/ Apples, pears, plums, peaches, nectarines, kiwifruit, and strawberries.

4/ Apples, oranges, tangerines, lemons, pears, canned or frozen (corn, peas, mixed vegetables, tomatoes, green beans, and spinach). Sales must be registered by July 1, 1995; final export date is July 31, 1995.

5/ Includes Bolivia, Colombia, Ecuador, El Salvador, Peru, and Venezuela.

6/ Almonds, walnuts, pistachios, pecans, and hazelnuts; apples, pears, plums, peaches, nectarines, and strawberries.

### Taiwan relaxes import requirements for shelled walnuts and fresh ginseng

Taiwan's Board of Foreign Trade issued a press release on December 31, 1994, in which new import requirements were announced for shelled walnuts and fresh ginseng. Under the revised requirements, which are effective immediately, shelled walnuts (tariff no. 0802.32.00.00-2, fresh or dried) and fresh ginseng (tariff no. 1211.20.10.00-7) can be imported without obtaining a visa from the Department of Health as long as importers indicate on the manifest that these imports are "not to be used as Chinese medicine". Previously, imports of Chinese herbs were limited to those importers who possess a license of "Chinese Medicine Dealer" or Pharmaceutical Manufacturer.

### Export opportunities for french fries to the Gulf markets

Several importers in Bahrain, Oman, and the United Arab Emirates (UAE) are seeking U.S. suppliers of french fries. They note a major shortage of french fries from the European Union (EU), the traditional supplier of this product to the Gulf markets. An important importer in Kuwait reported switching from a Danish to a U.S. supplier of french fries. This company found U.S. prices competitive despite higher U.S. freight rates than those of Europe.

The shortage of EU supplies and consequently higher prices presents a potential market opportunity for U.S. french fries in the Gulf region. The recent decline of the U.S. dollar against most European currencies should provide a further advantage to U.S. suppliers.

According to private traders and official statistics, the five Gulf countries (Bahrain, Kuwait, Oman, Qatar, and the UAE) import annually an estimated 7,500 metric tons of french fries, valued at over \$8.0 million, CIF basis. The Netherlands, Belgium, Denmark, and Egypt are the region's principal suppliers, followed by Canada and recently South Africa. In 1994, the United States held about a 6 percent share of this market.

## **WORLD TRADE SITUATION AND POLICY UPDATES**

### **U.S. seeks consultations with EU on canned fruit**

The U.S. government has requested consultations with the Commission of the European Union to discuss possible EU non-compliance with provisions of the Canned Fruit Accord. The consultations, to occur within the context of the annual canning fruit price-setting exercise, were prompted by U.S. industry concerns over alleged fraud and abuse by Greece. Independently, the EU Commission has launched a full investigation of the Greek regime, including the massive, open-ended withdrawal program for raw peaches. In setting the "world" price of canning fruit, the Canned Fruit Accord purports to limit the amount of compensation provided Greek and other EU canners, who in theory must procure supplies of raw peaches at high minimum guaranteed prices. Aided by generous EU subsidies throughout the 1980s, Greece has become the dominant supplier of canned peaches in the world. Greek product has displaced U.S. canned peaches in many important third-country markets. Shipments of Greek product in 1994/95 (June/May) are projected to reach a record 360,000 metric tons.

### **ITC rules no domestic industry injury from imported tomatoes**

The U.S. International Trade Commission (ITC) issued a negative determination on April 17 in the provisional relief phase of its investigation concerning increased imports of fresh winter tomatoes. The ITC will continue with a full investigation of the petition submitted by the

Florida Tomato Exchange under section 202 of the 1974 Trade Act. The Commission must make a final injury determination by July 27, 1995, and transmit its report, including any final remedy recommendation, to the President by September 25, 1995. Mexico's tomatoes compete with supplies from Florida during the first four months of the year. The Florida industry's concern heightened early this year when the devalued Mexican peso made exports to the United States very attractive. The petition was prompted by a surge of product from Mexico that resulted in triggering provisions of the seasonal TRQ under the NAFTA. The TRQ was set at 172,300 metric tons over the period November 15-February 28. Florida growers have asked the government for a more restrictive form of TRQ to guard against price distortions resulting from a glut of imported tomatoes in the market.

### **Additional China market access for U.S. apples and cherries achieved; high tariffs remain an obstacle to exports**

The United States and China agreed on two new export protocols for U.S. apples and sweet cherries during talks in San Francisco the week of April 17. Specifically, China agreed to expand the Washington state apple protocol, finalized in June 1994, to include the states of Oregon and Idaho. In addition, China agreed to permit the United States to ship, for the first time, fresh sweet cherries from Washington state, the nation's largest cherry producing state. These actions are related to the 1992 Memorandum of Understanding with the United States, in which China agreed to base its technical access measures on sound science. China renewed this commitment in March 1995 as part of a broader U.S.-China agreement involving trade, protection of intellectual property, and conditions for China's entry into the World Trade Organization. Efforts to continue to secure access for a range of other currently banned U.S. fruits, such as grapes, citrus, stone fruit, pears, and apples from other producing states. This latest development does represent a significant step toward's China's establishment of a sound science-based import system. However, high duties for fresh fruit (40-80 percent) are expected to continue to discourage direct exports of approved commodities.

# **Brazilian FCOJ exports to Japan increase sharply and partially offset lower shipments to Europe and North America**

Brazil's FCOJ exports to Japan in calendar year 1994 reached 103,932 metric tons (65 degrees brix) -- 65 percent above the previous season's shipments and more than double the 1992 volume. Japan's record-breaking hot summer in 1994 and a favorable yen/dollar exchange rate were the main contributors to the increased demand for orange juice. Brazilian

orange juice storage terminals, which have successfully been operating on the coast of Japan since May 1993, have also helped increase the level of imports from Brazil. Brazil supplies approximately 80 percent of Japan's total orange juice imports. However, reduced Brazilian FCOJ exports to Europe (down 9 percent) and North America (down 3 percent) more than offset the higher shipments to Japan. Brazil's FCOJ exports to all destinations in calendar year 1994 totalled 1.15 million metric tons (65 degrees brix) -- 2 percent below the previous year's volume.

**Table**  
**BRAZIL EXPORTS OF FROZEN CONCENTRATED ORANGE JUICE**  
**CALENDAR YEARS 1989-1994**  
**Metric Tons, 65 Degrees brix**

Destination	1989	1990	1991	1992	1993	1994
<b>North America</b>						
United States 1/	255,742	404,726	320,488	334,083	335,088	333,683
Canada	61,485	34,670	55,018	19,585	10,116	892
<b>Subtotal</b>	<b>317,227</b>	<b>439,396</b>	<b>375,506</b>	<b>353,668</b>	<b>345,204</b>	<b>334,575</b>
<b>Europe</b>						
Belgium	101,509	114,790	94,925	127,787	196,327	214,068
Finland	3,543	3,015	3,979	4,938	7,337	10,571
France	482	259	424	3,423	5,463	433
Germany 2/	17,700	34,766	23,124	10,121	7,857	3,498
Greece	4,374	3,617	2,638	0	50	0
Netherlands	210,804	306,158	327,195	348,188	453,997	392,616
Norway	928	228	314	465	145	158
Spain	1,040	23	4	1,036	74	901
Sweden	486	633	894	714	868	1,661
United Kingdom	2,969	3,845	10,505	21,196	25,063	14,056
Other	883	760	1,446	3,140	3,450	1,516
<b>Subtotal</b>	<b>344,718</b>	<b>468,094</b>	<b>465,448</b>	<b>521,008</b>	<b>700,631</b>	<b>639,478</b>
<b>Other Countries</b>						
Japan	20,718	20,625	25,572	45,575	63,018	103,932
Korea	14,117	15,444	40,868	34,971	33,981	34,515
Israel	5,025	4,580	494	273	966	606
Australia	9,712	1,166	11,423	3,262	6,643	14,393
New Zealand	3,040	2,156	2,583	3,564	5,518	5,498
Other	9,976	2,475	4,796	6,306	9,280	13,761
<b>Subtotal</b>	<b>62,588</b>	<b>46,446</b>	<b>85,736</b>	<b>93,957</b>	<b>119,406</b>	<b>172,705</b>
<b>Grand Total</b>	<b>724,533</b>	<b>953,936</b>	<b>926,690</b>	<b>968,627</b>	<b>1,165,241</b>	<b>1,146,758</b>

1/ Includes Puerto Rico which is listed as a separate destination in Brazilian statistics. May also include some exports to Canada which are transhipped through the United States.

2/ Includes Former East Germany.

Source: Bank of Brazil/CACEX from 1987-88 and DECEX from 1989-93.

## KIWIFRUIT SITUATION FOR SELECTED COUNTRIES

The world kiwifruit situation is characterized by bipolar production, with the harvest in the Northern Hemisphere (October-November) generally complementing supplies harvested in the Southern Hemisphere (April-June). Kiwifruit production and trade in 10 major producing countries have increased dramatically over the past decade, especially in the European Union (EU). By the end of the 1980s, production had far outpaced demand from the importing countries. This situation led to considerable vine-pulling and generally slower growth in planted area. Increases in world kiwifruit production combined with improved storage facilities and technology (e.g., controlled atmosphere storage) have allowed sales in the Northern and Southern Hemispheres to overlap, leading to downward price pressure. While devastating to many farmers in certain regions, the lower level of prices has probably helped boost kiwifruit consumption around the world. Exports of U.S. kiwifruit in 1994/95 are expected to reach 8,800 tons, a slight increase over the previous year. In coming years the kiwifruit industry will focus efforts on balancing supplies with demand, while seeking adequate returns to growers. Part of the task will be to stimulate demand among both importing and exporting countries. This is crucial given the potential for production increases in coming years.

### Kiwifruit production in selected countries forecast down in 1994/95

World kiwifruit production for 1994/95 is forecast at 821,200 tons, seven percent below last year's level and 15 percent down from the record outturn in 1992/93. Tighter supplies are expected to curb exports in 1994/95 to about 487,000 tons, down about 10 percent from the previous year. This report updates information presented in our April 1994 publication (FHORT 4-94; pp 46-55). For 1994/95, Northern Hemisphere countries harvest Oct-Nov 1994, and Southern Hemisphere countries harvest Apr-Jun 1995.

### NORTHERN HEMISPHERE

The European Union (EU) is the world's most important kiwifruit growing region. Italy dominates EU production. The EU greatly facilitated conversion of crop land to kiwifruit in the 1980s through widespread subsidies. Although most subsidies have reportedly been eliminated, their impact has been enormous. Current estimated production in 1994/95 for

selected EU countries is about 394,000 tons, about 10 times the level estimated for the United States this season. Despite its huge production, the EU remains a net importer of kiwifruit. Net imports of kiwifruit in the EU, excluding intra-EU trade, totaled about 52,300 tons in 1992/93.

### ITALY

#### Italy is the goliath of world kiwifruit production

Italy accounts for slightly over half of total production from selected Northern Hemisphere countries in 1994/95. The 1994 crop is estimated at 260,000 tons, a decline of 16 percent from the previous year's output due to below average yields from unfavorable weather conditions. As with other EU producers, Italy's entry into kiwifruit is comparatively recent, dating from the 1980s. During the last decade some of Italy's regional governments provided subsidies for planting alternative horticultural crops, including kiwifruit. However, these subsidies have reportedly been suspended as a means of guarding against over-planting. Area planted to kiwifruit has stabilized at 20,000

hectares, concentrated in the regions of Lazio (6,000 hectares), Emilia-Romagna (4,655 hectares), and Piedmont (3,018 hectares). Planted area in 1994/95 is slightly less due to some conversion of kiwifruit to hardier table grapes in some drought-prone southern regions. Currently there are no EU or Italian government subsidies specifically covering kiwifruit production.

#### **Kiwifruit consumption stagnant at about 115,000 tons**

Kiwifruit consumption in Italy closely parallels production. In general, the domestic market is very price-sensitive. Local kiwifruit producers directly benefit from New Zealand advertising campaigns aimed at increasing Italy's consumption. Consequently, the Italian Kiwifruit Producers Association (CIK) has not invested in domestic advertising in several years. However, in the major producing area of Lazio, the regional government has recently begun an advertising program aimed at increasing local consumption of Lazio kiwifruit. According to CIK, almost all kiwifruit is sold on the fresh fruit market. There is very little further processing, although small quantities are diverted to confectioners and frozen fruit juice manufacturers.

#### **Italy's exports settle somewhat in 1994/95 after exploding in recent years**

Italian kiwifruit exports are forecast to settle at about 170,000 tons in 1994/95 due to lower domestic availabilities. The following table shows Italy's meteoric rise as a producer with only limited exportable surplus of kiwifruit in the mid-1980s.

**Italy's Meteoric Rise as Kiwifruit Producer  
(Calendar Year; Metric Tons)**

Year	Area	Production	Exports	Imports
1986	8,969	55,000	11,000	4,000
1987	12,848	91,000	22,000	9,000
1988	15,926	124,000	45,000	12,000
1989	18,070	230,000	67,000	10,000
1990	19,758	275,000	108,000	13,000
1991	19,103	260,000	119,000	21,000
1992	20,000	374,000	169,000	19,000
1993	20,000	310,000	232,000	18,000
1994	19,500	260,000	170,000	20,000

Source: USDA/FAS report IT5005; 1994 trade data estimated.

Given the overall stagnant demand for kiwifruit and the reportedly stable area planted, Italy is not likely to register huge gains in exports in coming years. Italy's primary export markets are other EU countries. In 1993, shipments to other EU destinations accounted for about 73 percent of total exports. Prospects remain good for shipments to EU markets during the peak Northern Hemisphere shipment period. Some competition from New Zealand and Chile occurs when high production leads to end of season stocks. The accession of Austria and Sweden into the EU should bolster Italy's earlier market development efforts there.

#### **Italy's kiwifruit imports rise**

Despite its dominant position in export markets, Italy is also an importer of kiwifruit during the off season from May through October. Italy imported 21,000 tons of kiwifruit in 1993/94, and is expected to take 25,000 tons in the current marketing year. The rise is in part due to lower availabilities of locally produced kiwifruit in the domestic market. Chile and New Zealand are the major suppliers of imported kiwifruit to Italy, collectively contributing about two-thirds of total imports during 1993. In view of the bipolar production season, Chile and New Zealand will remain the primary beneficiaries of import demand from Italy. However, the length of season in coming years could be affected by technological advances in controlled atmosphere storage and forced maturation.

### **FRANCE**

France is the EC's second largest kiwifruit producer, with an estimated 72,000 tons harvested for 1994/95. Production this year is only marginally higher than last season's, as expansion of area planted appears to have stopped. French Customs data show that it is a net importer of kiwifruit, taking about half of total deliveries from other EU countries. However, imports from other EU suppliers (Italy) have been falling and Chile and New Zealand have been vying for shares as France's largest off-season sources of kiwifruit.

## **GREECE**

### **Low profitability likely to staunch area expansion**

Production in 1994/95 is estimated at 40,000 tons, down from last year due to adverse weather during pollination that led to lower yields and smaller fruit size. Greece responded to very favorable world prices and jumped into the kiwifruit industry in the 1980s along with many other EU countries. Rapid expansion led to higher availabilities of fresh kiwifruit and substantially lower prices. This situation has helped to stabilize crop area, currently estimated at 4,150 hectares, and no further expansion in planted area is currently anticipated for Greece. Kiwifruit production is centered in Western and Central Macedonia, particularly in the district of Pieria, which accounts for 1,910 hectares. Over the past few years, Greek growers have sustained marked declines in returns, which resulted in heavy losses. This has reportedly led some growers to either abandon plots or cut corners in tending some orchards. Thus, the next few years will be crucial for the domestic Greek industry in terms of area planted. Persistent low prices could result in some shifting out of kiwifruit.

### **Greek exports forecast down in 1994/95 based on lower available supplies**

Greek kiwifruit exports in 1994/95 are projected to fall to about 17,500 tons, down from last season's record. Through the start of December 1994, about 75 percent of Greek kiwifruit exports were shipped to EU member states, the balance going to markets in Eastern Europe. Difficulties in former Yugoslavia dramatically pared exports to that market in 1993 and forced shippers to redirect cargoes for other countries through Bulgaria, Hungary or Italy. In an effort to meet the rise in freight costs resulting from this change in shipping patterns, the EU approved a special aid package of 4.0 ECU/100 kilogram which applies only to shipments to EU countries of Northern Europe, excluding Italy, France, Spain, and Portugal (EU Regulation No. 1402/94).

### **Greece imports comparatively small quantities of kiwifruit in off-season**

Greece imports only small quantities of kiwifruit, usually during July-September when locally produced kiwifruit are not available. Imports are

forecast to reach about 750 tons in 1994/95. The import duty on kiwifruit from non-EU countries is generally 11 percent of CIF value. An eight percent VAT based on CIF value (including duty) is levied on imports from all origins.

The Greek Government has encouraged construction of cold storage facilities over the past several years. Utilization of the unit in Korinos-Piera for the 1994 crop was only one-tenth of its 5,000-ton capacity. The nearby private facility in Karitsa-Pierias (2,000 ton capacity) became fully operational this year. Currently there are no price supports for kiwifruit, and no subsidized producer credit is available. The Integrated Mediterranean Programs (EC Regulation No 2088/85), which covered the important period 1987-1992, has been terminated. EC Regulation No 2328/91 replaces the Modernization of Agricultural Operations program (EC Reg. No 797/85) and does not encourage new kiwifruit plantings.

## **PORTUGAL**

### **Early euphoria now tempered by steep declines in grower prices**

Kiwifruit was introduced to Portugal as an experimental crop in the early 1980s but only began to expand after Portugal's accession to the EU in 1986. As an EU member, Portugal was able to take advantage of subsidies on investment costs. Kiwifruit production increased in 1991/92 and 1992/93, in large part due to maturing vines. Area harvested continued to expand in 1993/94; however, intense rainfall and low temperatures during flowering contributed to a lower crop, estimated at 8,100 tons, down 20 percent from the previous year. Further expansion is anticipated in 1994/95, as areas planted three to four years ago have come into production. Production in 1994/95 is provisionally set at a record 12,500 tons. Producer prices fell dramatically over the 1990s, firming somewhat last season because of the smaller crop. Despite the steep decline in returns to growers, kiwifruit is likely to remain an important feature of Portugal's agriculture as it is one of the few economically viable crops. Further rises in production are likely in the future, as about 30 percent of planted area reportedly has yet to bear fruit.

### **Portugal is a net importer; declining prices have fueled demand**

Consumption of fresh kiwifruit has been trending upward in line with increased domestic availabilities and lower retail prices. Consumer purchases are influenced by prices and supplies of other fruit (apples in winter, bananas in summer). Appearance of fruit is reportedly an important factor in influencing consumer decisions. Portugal is a net importer of kiwifruit and is expected to take 10,000 tons from other suppliers in the current year, primarily from Italy, France, and New Zealand. In future years, however, imports are likely to stagnate at current levels or even decline as Portugal's domestic production picks up.

### **SPAIN**

Spain's production of kiwifruit is small and no significant expansion in total area is expected in the near future. Galicia (northwestern Spain) is the primary production area accounting for about 50 percent of total planted area. Estimates for 1994/95 are 900 hectares planted, 750 hectares harvested, and 9,600 tons produced. Unless kiwifruit grower prices improve, there could be some pulling of kiwifruit vines in areas of mixed production (kiwifruit/grapes) and replanting with grapes. Wine grapes reportedly offer growers better returns than kiwifruit at current prices.

#### **Spain still offers incentives to kiwifruit producers**

Some regional governments have set up an annual aid budget based on hectares of kiwifruit planted and start-up costs. Aid is based on whether the farmer is full-time or part-time, or is a member of a cooperative. Full-time cooperative members receive the highest share of assistance. Some regional governments offer subsidized loans at 3-4 percent below market interest rates to first-time kiwifruit farmers.

#### **Spain's imports outstrip production by over four-fold**

Spain is primarily an importer of kiwifruit. Imports in 1994/95 are expected to reach 44,500 tons, marginally higher than last year. This is a noteworthy increase given that Spain began importing kiwifruit only five years ago. Italy and France are the primary suppliers of kiwifruit to Spain, followed by New Zealand and Chile. Local kiwifruit are marketed by only a few Galicia-based firms, mainly from November through February. Imports from Italy and France

usually take place November through May, while fruit from Chile and New Zealand typically arrive June through December. Although a ban on U.S. fresh fruit was lifted in mid-1993, prospects for U.S. kiwifruit in this market are limited given strong competition from low-price EU neighbors during the export season.

### **JAPAN**

#### **Decreasing competitiveness and an aging farm population may thwart Japan's production targets**

Kiwifruit production in Japan for 1994/95 is estimated at 49,600 tons, a six percent decline from the previous year, due in large part to a reduction in area. A recent Japanese industry survey revealed that planted area fell five percent in 1993/94 from the previous year, the first decline ever registered for kiwifruit. This decline was triggered by continued saturation of the kiwifruit market due to stagnant consumer demand and the decreasing competitiveness of local product relative to imports. Over the long term, Japanese production is not expected to reach the government's goal of 83,000 tons by the end of the century.

Japan is forecast to import 49,000 tons of kiwifruit in 1994/95, up from the preceding year in response to lower domestic supplies. Imports come primarily from New Zealand, in large part due to its complementary season and proximity. Chilean kiwifruit has dramatically increased its share of the market since 1992. Interest in U.S. kiwifruit is usually limited, as it competes directly with local Japanese production. According to industry sources, Japan's future demand for kiwifruit is not likely to exceed 100,000 tons, split between local production and imports.

#### **Japanese Imports of Kiwifruit by Origin (Metric Tons)**

Supplier	1992	1993	1994 (Jan-Oct)
United States	1,661	289	196
New Zealand	48,608	43,082	33,041
Chile	1,996	3,687	5,728
TOTAL	52,265	47,058	38,965

Source: Customs Bureau, Ministry of Finance (USDA/FAS report JA5002)

### Average Import Prices of Kiwifruit by Origin (Yen per Kilogram, CIF 1/)

Supplier	1992	1993	1994 (Jan-Oct)
United States	339	202	273
New Zealand	228	211	208
Chile	263	131	110

Source: Customs Bureau, Ministry of Finance (USDA/FAS report JA5002)

1/ Average exchange rates (yen to one U.S. dollar):  
1992 = 127; 1993 = 112; 1994 = 104.

### UNITED STATES

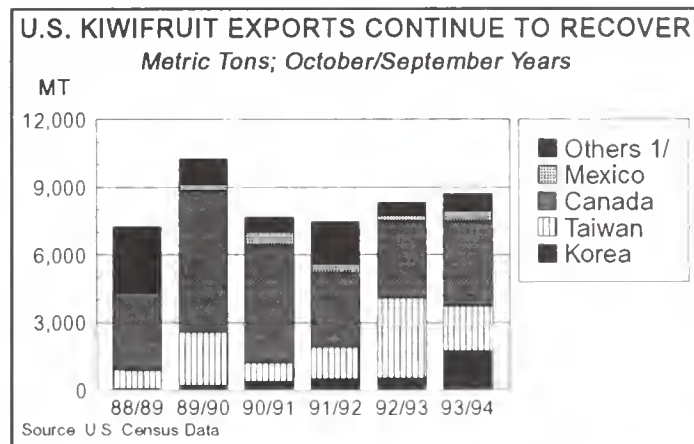
The U.S. commercial kiwifruit industry is based around Gridley, in northern California. Kiwifruit production in 1994/95 is estimated at 38,600 tons, a 13-percent decline from the previous year. Continued low domestic and world prices led to a reduction in area planted in 1994/95, the second consecutive decline since commercial production began in the early 1980s. Domestic prices fell from \$904/ton in 1991/92 to \$331/ton the following year. This collapse in prices forced some growers to pull vines and plant other crops. Last year grower prices firmed somewhat, rising to an average \$407/ton during the 1993/94 season. At the retail level there is some indication that prices have stabilized, as the national average price (November 1994-January 1995) has remained unchanged from the previous year at \$0.23 per unit of fruit.

Prospects have improved during the current marketing year. Export shipments of 5,094 tons were registered for the months of October 1994 through February 1995, a three percent rise over the same period in the previous year. The pace of shipments, both to the domestic market and export channels has been quite brisk this season, setting monthly records in October, November, and December. By mid-April, the U.S. kiwifruit industry had only about 300,000 tray equivalents (about 950 tons) left in cold storage. In an effort to boost consumer awareness and demand, the California Kiwifruit Commission (CKC) undertakes promotional campaigns both in the United States and in export markets.

### Canada, Korea and Taiwan are major export markets

Total U.S. exports of kiwifruit during 1993/94 reached 8,749 tons, an increase of about five

percent over the previous year. The value of exports in 1993/94 was approximately \$13.1 million, a 9-percent rise from last season's level. Among the major markets for U.S. kiwifruit are Canada, Taiwan, and Korea, which collectively accounted for slightly more than 85 percent of total exports in 1993/94. Thus far in 1994/95, this shipment pattern appears to have changed, due in large part to a slower export pace to Taiwan resulting from a higher customs valuation vis-a-vis other suppliers. For example, French kiwifruit are valued at \$1-\$2 per tray below U.S. kiwifruit. Shipments to Korea through February 1995 were 46 percent ahead of last year's pace, and exports to Hong Kong were about 44 percent ahead of the year earlier period. The Korean market has become a key success story for the United States. Exports have grown almost 10-fold over the past five years, rising from \$391,700 in 1989/90 to \$3.12 million in 1993/94. Shipments to Korea could grow if phytosanitary issues and related customs clearing procedures are resolved. Approximately 80 percent of all U.S. kiwifruit marketed during 1993/94 were consumed domestically. For 1994/95 through February, deliveries to the U.S. domestic market were about 10 percent more than the same period last year.



### The Canadian market for U.S. kiwifruit shows signs of recovery

After four straight years of decline, U.S. kiwifruit exports to Canada show signs of recovery. Exports hit \$4.6 million in 1993/94, an increase of seven percent over the previous year. The California Kiwifruit Commission (CKC) has faced one of its toughest battles in Canada. In 1989, cheaper Italian fruit began to flood many of California's traditional markets in eastern Canada. Over the past four years this stiff

competition has contributed to a 50-percent drop in U.S. exports to eastern Canada. The CKC responded by shifting focus to western Canada, where California has a geographic advantage. Recently, U.S. shipments to eastern Canada have started to recover, in part due to retailer concern over inconsistent quality of Italian product.

#### **The United States is a net importer of kiwifruit**

Imports usually begin in April and end in October when the U.S. crop is harvested. However, improved cold storage technology in major supplying countries has greatly extended the shipping season. This has caused some concern in producing countries, as there is some possibility for pressuring prices downward when old-crop imports compete with new-crop domestic fruit. Chile has emerged as the leading supplier of kiwifruit to the U.S. market since the anti-dumping action against New Zealand was implemented in 1992. The following table shows the development of U.S. imports over the past five years.

#### **United States Kiwifruit Imports Resume Growth (Oct/Sep Year; Metric Tons)**

Supplier	1989/90	1990/91	1991/92	1992/93	1993/94
Chile	627	3,098	12,311	19,444	24,831
N.Z.	29,633	27,888	7,801	4,672	3,414
Italy	0	296	59	675	1,049
Others 1/	0	32	0	0	42
<b>TOTAL</b>	<b>30,260</b>	<b>31,314</b>	<b>20,171</b>	<b>24,791</b>	<b>29,335</b>

Source: U.S. Bureau of Census data. Totals may not add due to rounding.

1/ Others includes small quantities from Canada, Switzerland, Australia, and Caribbean countries.

Italy, the world's largest producer and exporter, has established a small but expanding market in the United States. Italy's kiwifruit competes directly with U.S. domestic production, as imports begin arriving in November. According to U.S. Census data, the average value of imported Italian kiwifruit was \$0.70 per kilogram during October 1994 through February 1995. In contrast, the average 1993/94 import value of New Zealand kiwifruit was \$0.82 per kilogram and the average for Chilean fruit was \$0.56 per kilogram.

#### **Dumping margin on New Zealand kiwifruit reduced after first administrative review**

The U.S. Commerce Department's determination of injury to the U.S. domestic kiwifruit industry from imports of New Zealand kiwifruit led to the imposition of a 98.6 percent anti-dumping duty in May 1992. The dramatic decline in imports from New Zealand from 1991/92 through 1993/94 is a direct consequence. However, the downward trend could be affected by the final results of the first administrative review, which covered the period November 27, 1991, through May 31, 1993. The dumping margin has been revised downward to 10.18 percent.

The U.S. Customs Service requires a cash deposit or bond equal to the dumping margin on all imports of kiwifruit from New Zealand. The review will mean a refund on deposits made during the period covered by the first review. A second review is underway to determine if the anti-dumping duty should remain in effect. The average import value of New Zealand kiwifruit in 1993/94 was \$0.82 per kilogram.

The following table shows the decline in U.S. grower prices over the past several years. The low level of prices received during 1992 corresponded with the U.S. Commerce Department's anti-dumping action against imports of New Zealand kiwifruit. Prices firmed in 1993. There is some optimism that this situation could further improve in 1994/95, based on the brisk pace of sales through February.

#### **Season-Average U.S. Kiwifruit Grower Prices, 1986-1993 1/ (\$/MT)**

1986	1987	1988	1989	1990	1991	1992	1993
1,135	783	838	441	457	904	320	407

1/ Average prices producers receive at the point of first sale.

#### **SOUTHERN HEMISPHERE COUNTRIES**

The Southern Hemisphere kiwifruit industry is centered in New Zealand and Chile. Australia, by comparison, is a very small kiwifruit producer. Collectively, these suppliers account for about 340,000 tons or 40 percent of world production.

## NEW ZEALAND

### New Zealand is the dominant supplier in the Southern Hemisphere

Kiwifruit production in 1994/95 is forecast to decline eight percent to 207,000 tons, due in large part to wind and frost damage during flowering and also to lower area under cultivation. The reduction in area is expected to be partially offset by improved yields in the remaining orchards. Despite the wind and frost, pollination and growing conditions were generally favorable; quality is reportedly excellent. The area of producing vines is down to 12,850 hectares from a peak of 16,000 hectares in 1987/88.

### The Kiwifruit Marketing Board's policies have addressed expanding world production and declining prices

The Kiwifruit Marketing Board (KMB) has employed two strategies designed to limit the volume of fruit marketed: 1) the grower-financed vine pull scheme; and, 2) crop management policy. The KMB's crop management policy emphasizes production (packed volume) targets that are based on demand from export markets. Packhouses are responsible for determining which grower's fruit not to pick, or which fruit to pick and then store in field bins. The KMB then pays these selected growers the net amount (after picking and packaging costs) it pays to other growers. The KMB would like to have 50-55 million trays for marketing each year. Current forecast for the 1995 crop suggests an export availability of 50 million trays.

In an effort to reduce storage losses, the KMB continues to expand its Controlled Atmosphere (CA) program. The CA program for the 1995 season is expected to account for five million trays. The bulk of New Zealand's kiwifruit is stored in field bins and then packed as required later in the season.

### KMB commercial debt repaid on marketing error

An inaccurate pre-harvest forecast in 1991/92 led the KMB to conclude that crop management would not be necessary. However, the final crop that year was well above the 60-million tray estimate at 67.3 million trays (242,280 tons). The final export total was 55 million trays (198,000 tons). As a result of this over-supply situation the KMB sustained huge losses, which lowered grower returns on the 1991/92 crop.

The loan from the growers was fully repaid only after the 1994 export campaign. The following table presents KMB data on the loan repayment scheme.

### New Zealand Kiwifruit Prices 1/ (\$NZ/tray = \$NZ/3.6 kg)

	1990	1991	1992	1993	1994
NZ\$/tray farm gate	4.70	6.08	3.85	4.18	4.52
NZ\$/tray KMB receipts	4.70	6.08	2.65	5.32	4.91

Source: FAS/Wellington and New Zealand KMB data

1/ For 1992, the NZ\$3.85 farm gate price was supplemented by \$1.20 of commercial KMB debt, subsequently repaid in 1993 and 1994. Note: 1993 data are preliminary. Data based on trays submitted, not trays sold.

### KMB continues to exercise monopoly control over exports, but for how long?

New Zealand is the second largest exporter of kiwifruit after Italy. The KMB exercises control over export sales to all markets except Australia, which usually takes Grade II kiwifruit. Export trade is dominated by shipments to EU countries, with smaller amounts going to Japan and the United States. Collectively, these three markets account for about 81 percent of total exports in 1993/94. Exports in 1994/95 are forecast at 167,000 tons, down about eight percent from last year and well below the 203,000-ton level recorded in 1991/92. Part of the decline is attributable to lower sales to the EU stemming from higher domestic production in Europe. The KMB recently announced an agreement with Italy to market Italian kiwifruit in the United Kingdom during New Zealand's off-season. The wild card in analyzing market opportunities in the EU is Greece, where the potential for increased exportable supplies is considerable.

The KMB has been under intense scrutiny since the disastrous 1992 season. The Kiwifruit Industry Marketing Review Committee was established by the Minister of Agriculture to guide future policy decisions regarding the KMB. A report submitted to the committee in October 1994 contained four points: 1) investment in the KMB from both growers and others should be allowed; 2) a retailing strategy to promote a differentiated brand direct to consumers; 3) retention of the KMB's monopoly on exports, but with a sunset clause in the future; and 4) a joint-venture marketing arrangement to consolidate activities (possibly with the Apple and Pear

Marketing Board).

## **CHILE**

Kiwifruit production in Chile in 1994/95 is forecast at a record 126,500 tons, up ten percent from the previous year on better yields. Chile's kiwifruit plantings have stalled as a result of reduced profitability from export sales. Negative returns during the last two years forced marginal growers to pull vines. Planted area is expected to level off by 1996 at 9,500 hectares; output will likely stabilize at about 130,000 tons.

### **Chile hopes to boost export sales through new Export Promotion Fund**

Chile is primarily a kiwifruit exporter, with about three-quarters of total commercial production entering export channels in 1993/94. Shipments in 1994/95 are forecast at 95,000 tons, an increase of ten percent due to reduced competitor supplies. Export sales in the current year will be aided by a new government-backed program, the \$10-million Export Promotion Fund (EPF). The fund will be managed by the Chilean Government's export promotion agency, ProChile, and will be overseen by an advisory committee with public and private sector representatives. Among the EPF's first activities are promotions totaling \$2.5 million in Japan (grapes and kiwifruit) and the United States (kiwifruit). Chile's major markets are the EU, the United States, Argentina, and Brazil. Traditionally, Chile's export efforts have focused on the EU, although demand is now somewhat diminished as domestic EU production continues to flourish. However, shipments to the United States have expanded rapidly, partly in response to the competitive advantage provided Chile by U.S. anti-dumping duties assessed against New Zealand. Indeed, the United States is now the single largest destination for Chilean kiwifruit. Producers and exporters are reportedly focusing on quality improvement and expansion of demand in overseas markets, especially Latin America, Japan, and the United States. The campaign in the United States includes a joint promotional program with the California Kiwifruit Commission. Export sales to Argentina, mostly of large bins trucked over the border, have risen markedly without benefit of any promotional effort.

### **Reform of Chile's quarantine requirements could improve potential for imports**

Until recently, imports of kiwifruit and deciduous fruit into Chile were prohibited because of phytosanitary regulations. However, in 1994 substantial progress was made by the United States and Chile in addressing these concerns. This could mean that by the end of 1995 the United States will be able to export kiwifruit to Chile for the first time. It should be noted that U.S. kiwifruit would likely have only a limited market in Chile, as there is only a narrow window of opportunity when supplies of low-cost domestic kiwifruit are not available.

## **AUSTRALIA**

Australian kiwifruit production in 1994/95 is projected to reach 6,000 tons, a nine percent increase over the previous year. Production of kiwifruit expanded rapidly in Australia in the 1980s, from 500 tons in 1982/83 to 9,500 tons in 1987/88. However, this expansion led to a serious oversupply situation and plummeting prices. Several large operations pulled vines and ceased production in 1989, resulting in a 46-percent decline in planted area. Since 1988/89, planted area has continued to decline gradually, while production has steadily increased due to higher yields from maturing vines. Australian kiwifruit production is concentrated in the states of Victoria, New South Wales, and Queensland. Kiwifruit are harvested from March through May.

### **Australia is a net importer of kiwifruit**

Australia imports more than twice as much kiwifruit as it produces. Domestic consumption has increased markedly in recent years as the availability of kiwifruit has increased and the price has fallen. Imports in 1994/95 are forecast at 14,000 tons, up about 16 percent from last season. New Zealand dominates the imported kiwifruit market. Although Australian Bureau of Statistics data do not disaggregate kiwifruit imports from the "other fruit" category, a proxy for imports is the official New Zealand KMB export data. For 1994, New Zealand exported 12,002 tons of kiwifruit to Australia, most of it second grade fruit.

### **Australia exports small quantities of kiwifruit to regional markets**

Australia exports small amounts of kiwifruit, forecast at 1,000 tons in 1994/95. While

Australia has limited early season advantage over New Zealand, prospects for kiwifruit exports are dampened by strong competition from countries such as Chile and the EU producer countries. A lack of direct shipping routes to potential Southeast Asian markets (e.g., Singapore) adds costs and hampers development of regional export markets. Thus, Australia is likely to remain a low-volume exporter.

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# **KIWIFRUIT PRODUCTION AND TRADE IN SELECTED COUNTRIES** **Split Marketing Years 1991/92-1994/95**

COUNTRY	YEAR	PLANTED AREA	PRODUCTION	EXPORTS	IMPORTS
<b>NORTHERN HEMISPHERE 1/</b>					
<b>Italy</b>	1991/92	21,000	309,000	119,000	21,000
	1992/93	20,000	374,000	229,098	19,051
	1993/94	20,000	310,000	215,000	21,000
	1994/95	19,500	260,000	170,000	25,000
<b>France</b>	1991/92	5,280	58,600	22,100	31,308
	1992/93	5,180	79,400	28,002	34,331
	1993/94	5,070	71,700	24,754	25,000
	1994/95	5,000	72,000	25,000	25,000
<b>Greece</b>	1991/92	4,053	29,700	13,830	876
	1992/93	4,063	46,600	19,393	445
	1993/94	4,150	46,200	24,486	784
	1994/95	4,150	40,000	17,500	750
<b>Spain</b>	1991/92	n/a	n/a	664	37,084
	1992/93	891	9,300	1,880	47,658
	1993/94	900	9,500	1,650	44,460
	1994/95	900	9,600	1,600	44,500
<b>Portugal</b>	1991/92	1,050	5,000	401	8,863
	1992/93	1,059	10,100	528	11,765
	1993/94	1,100	8,100	578	11,765
	1994/95	1,200	12,500	750	10,000
<b>Japan</b>	1991/92	5,000	45,000	0	42,651
	1992/93	4,950	53,800	0	47,854
	1993/94	4,720	52,100	0	45,282
	1994/95	4,440	49,000	0	49,000
<b>United States</b>	1991/92	2,955	26,900	7,485	20,171
	1992/93	2,954	47,400	8,359	24,791
	1993/94	2,873	44,600	8,749	29,334
	1994/95	2,833	38,600	8,800	29,500
<b>Subtotal Northern Hemisphere</b>					
	1991/92	n/a	n/a	163,480	161,953
	1992/93	39,097	620,600	287,260	185,895
	1993/94	38,813	542,200	275,217	177,625
	1994/95	38,023	481,700	223,650	183,750

-- Continued on next page --

**KIWIFRUIT PRODUCTION AND TRADE IN SELECTED COUNTRIES, cont.**  
Split Marketing Years 1991/92-1994/95

COUNTRY	YEAR	PLANTED AREA	PRODUCTION	EXPORTS	IMPORTS
<b>SOUTHERN HEMISPHERE 2/</b>					
<b>New Zealand</b>	1991/92	14,594	275,100	203,000	0
	1992/93	14,000	226,000	191,000	0
	1993/94	13,000	224,000	181,000	0
	1994/95	12,850	207,000	167,000	0
<b>Chile</b>	1991/92	12,560	99,500	66,410	0
	1992/93	12,770	111,000	75,365	0
	1993/94	11,500	115,500	86,000	0
	1994/95	10,890	126,500	95,000	0
<b>Australia</b>	1991/92	n/a	n/a	n/a	n/a
	1992/93	437	6,000	1,012	14,056
	1993/94	435	5,500	800	12,022
	1994/95	435	6,000	1,000	14,000
<b>Subtotal Southern Hemisphere</b>					
	1991/92	n/a	n/a	n/a	n/a
	1992/93	27,207	343,000	267,377	14,056
	1993/94	24,935	345,000	267,800	12,022
	1994/95	24,175	339,500	263,000	14,000
<b>TOTAL</b>					
	1991/92	n/a	n/a	n/a	n/a
	1992/93	66,304	963,600	554,637	199,951
	1993/94	63,748	887,200	543,017	189,647
	1994/95	62,198	821,200	486,650	197,750

Note: Production data for Northern Hemisphere countries are estimates; for Southern Hemisphere countries, forecasts.

1/ For Northern Hemisphere countries, data refer to crops harvested

2/ For Southern Hemisphere countries, data refer to crops harvested and marketed in the second half of the split-year.

Source: USDA/FAS attache reports; USDA, National Agricultural Statistics Service; and, U.S. Department of Commerce, Bureau of Census.

## CANNED DECIDUOUS FRUIT SITUATION FOR SELECTED COUNTRIES

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World production of canned deciduous fruit in 1994/95 for both Northern and Southern Hemisphere suppliers is expected to rise, primarily due to a substantially larger 1994 peach pack in Greece. Lower prices have stimulated sales, but the situation will continue to present challenges for the United States and other exporting countries in coming years. U.S. exports of aggregate canned deciduous fruit fell in 1993/94, and are not likely to rebound in the current year. U.S. canned pear exports are exhibiting some strength in 1994/95. Canned peach exports continue to face fierce competition from Greece and other EU suppliers in third-country markets. It is unclear whether reform of the EU's Common Agricultural Policy (CAP) will address the tremendous supply imbalance that is pressuring world markets. Persistent economic problems in many major markets suggest that growth in demand will remain slack. These factors are likely to spill over into 1995/96, as many Northern Hemisphere countries assess market prospects for their upcoming canning fruit crops.

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### CANNED PEACHES

**Led by Greece and South Africa, the 1994 pack rebounds**

Following an interruption in 1993/94 in the pattern of steady growth in canned peach production and trade, the industry currently appears to be expanding. Total canned peach output in selected countries during 1994/95 is forecast at 770,000 tons, up about 13 percent from last season (see FHORT 11-94, November 1994). Record production in Greece and South Africa, bolstered by gains in Spain and Chile, more than offset reductions in Argentina and Japan. Production increases in 1994/95 have exerted some downward pressure on prices and encouraged consumer sales. Total 1994/95 exports by selected suppliers are forecast at 549,210 tons, about 10 percent above the previous year. Continued gains in export volume are expected to contribute to lower carry-out stocks in 1994/95, the lowest level in six years.

### *EUROPEAN UNION (EU)*

**The EU continues to dominate all phases of the canned peach industry**

Led by Greece, Italy, and Spain, the EU accounts for about 73 percent of total production from selected countries. EU dominance is a direct result of the Common Agricultural Policy (CAP) of earlier decades that encouraged Greece to plant peaches and establish a canning industry. This policy continues today in the form of processor aids, minimum grower prices, and a massive, open-ended withdrawal scheme for surplus fruit. Currently there is an internal Commission investigation into alleged fraud and abuse of the Greek system. On a broader scale, it remains to be seen what CAP reform will mean for the canned peach industry, especially in Greece. Without sweeping reforms, these abuses will continue to contribute to domestic oversupply and disruption in world markets for canned peaches.

The EU is also the world's largest consumer of canned peaches, accounting for slightly more than half of total utilization in the surveyed

countries. Over the past 15 years the EU has evolved from substantial net importer to dominant supplier to many third-country markets.

## **GREECE**

### **Dominant Greece eats what it can and what it cannot eat it cans for the export market**

Greece dominates the EU canned peach industry. Production in 1994/95 is estimated at 373,500 tons or about two-thirds of total EU output. This is almost 30 percent above the 1993 pack. Earlier forecasts of the 1994 pack made shortly after the end of the season had pegged the pack at around 225,000 tons, a substantial decline from the previous year. Lower stocks and brisk demand from third-country markets in Eastern Europe and Latin America fueled the rise in the 1994 pack. Some of Greece's 30 canners report they will be unable to continue operating if prices do not improve. Indeed, industry sources predict that widespread consolidation will occur in the next few years. For the current season, canners are guardedly optimistic as ex-factory prices in March 1995 for standard grades were well above those offered in August 1994.

### **Exports set to explode in 1994/95 to new record**

Despite assorted problems plaguing the industry, Greek canned peach shipments in 1994/95 are forecast to reach a record 360,000 tons. The quality of packed product is considered good this season. Although the pit fragment problem persists, the industry considers it to be under control as most markets are price buyers. Greece is extremely active in non-EU export

markets, where it is a fierce competitor of the United States. Low export prices have led some markets to impose sanctions against Greek product. For example, Australia maintains a countervailing duty on Greek canned peaches, and Argentina is reviewing petitions from local canners to reimpose anti-dumping charges that lapsed in November 1994. Greece is also the major supplier of imported canned peaches to the NAFTA markets of the United States, Mexico, and Canada. Greece's apparent flexibility in price negotiations allows it to target export markets for development.

The following table shows that Greece has doubled canned peach exports over the past five years, largely to neighboring EU countries. The table also reveals dramatic gains in shipments to Canada, Mexico, Japan, and South American markets.

**Greek Canned Peach Exports Rise Dramatically  
(Calendar Years; Metric Tons, net weight)**

MARKET	1988	1989	1990	1991	1992	1993
Mexico	0	231	3,639	4,033	17,961	17,699
Canada	4,865	12,811	11,676	10,989	16,675	18,081
United States	22,897	26,507	14,817	10,412	11,431	7,894
<b>Subtotal</b>	<b>27,762</b>	<b>39,549</b>	<b>30,132</b>	<b>25,434</b>	<b>46,067</b>	<b>43,674</b>
Argentina	0	0	771	1,805	4,296	6,804
Brazil	0	0	532	2,570	2,873	4,235
Chile	0	0	461	229	247	62
Japan	8,852	15,851	10,300	14,064	16,123	16,596
Poland	966	739	3,085	4,602	6,468	6,916
<b>Subtotal</b>	<b>9,818</b>	<b>16,590</b>	<b>15,149</b>	<b>23,270</b>	<b>30,007</b>	<b>34,613</b>
Germany 1/	45,273	63,270	92,840	103,319	98,746	109,465
United Kingdom	22,778	24,692	34,083	28,226	31,471	45,057
Austria	2,368	4,624	3,960	5,505	7,093	6,860
Finland	1,423	3,171	4,682	3,553	6,488	3,242
Sweden	1,934	2,315	3,821	3,831	3,660	2,196
<b>Total EU</b>	<b>100,442</b>	<b>141,553</b>	<b>196,343</b>	<b>210,415</b>	<b>214,405</b>	<b>232,104</b>
Others	6,835	19,227	15,573	7,668	12,857	23,463
<b>TOTAL</b>	<b>144,857</b>	<b>216,919</b>	<b>257,197</b>	<b>266,787</b>	<b>303,682</b>	<b>333,854</b>

Source: Eurostat data 1988-1993. For 1993, Greek export data from GR5008 as Eurostat data are not disaggregated by member state.

1/Exports before 1991 are to West Germany. Austria, Finland and Sweden are included as EU member states although accession did not occur until January 1, 1995.

## **SPAIN**

Spanish canned peach production for 1994/95 is expected to reach 112,500 tons, a slight recovery from last season's lower pack but well below the record 1992/93 outturn. Many of Spain's canners are financially strapped from high interest rates and low returns. However, a recent move towards increased consolidation has helped to overcome the crisis.

### **Spain is primarily a fresh fruit market**

Only about 10 percent of the 1994 peach crop

was delivered to canners. Domestic consumption of canned product appears to have stagnated in recent years after rising steadily over the past decade.

Spain ranks third among EU member states behind Greece and Italy in terms of canned peach exports. Substantial devaluations of the Spanish peseta over the past two years have helped boost exports, estimated at a record 36,500 tons in 1993/94. The pace of Spanish canned peach exports for the first six months of 1994/95 indicates that total shipments for the year will be lower than last year's record.

## ITALY

The situation for Italy's canned deciduous fruit production remains critical. Italian canned peach production in 1994/95 is forecast at 50,000 tons, down from last year and only about half the level of the 1992 pack. Competition from the fresh fruit market, declining domestic consumption and low-cost Greek imports have contributed to this situation. Lower availabilities have helped to reduce stocks in the current climate of sluggish EU demand and steadily declining domestic consumption. In July 1995, the EU Commission is expected to decide about the removal of import duties on canned fruit from

third-countries. If the duties are removed, the situation is expected to become even more serious for Italy's canned fruit sector.

Despite the gloom in the industry, exports in 1994/95 are forecast at 42,000 tons, unchanged from the previous year. The following table shows the extent to which Italy depends on neighboring EU countries as markets for its canned peaches. Over the past six years almost 90 percent of Italy's total export volume has gone to other EU countries.

**Italy: Exports of Canned Peaches, 1988-1993**  
(Metric Tons, net weight)

MARKET	1988	1989	1990	1991	1992	1993
Germany <sup>1/</sup>	14,790	12,146	23,281	24,764	23,112	22,900
U.K.	5,843	7,102	6,399	7,168	7,557	5,300
Sweden	182	188	523	460	160	N/A
Austria	395	473	854	980	1,014	N/A
<b>Total EU</b>	<b>24,328</b>	<b>26,486</b>	<b>40,200</b>	<b>46,026</b>	<b>40,388</b>	<b>N/A</b>
United States	745	1,479	0	0	40	16
Saudi Arabia	1,704	896	1,332	1,985	431	N/A
Switzerland	256	232	137	189	246	N/A
Others	3,968	3,645	3,437	5,170	3,263	5,884
<b>TOTAL</b>	<b>31,001</b>	<b>29,470</b>	<b>42,260</b>	<b>49,756</b>	<b>42,477</b>	<b>44,300</b>

Source: Eurostat data 1988-1992, Agricultural Affairs office for 1993. Subtotals may not add due to rounding.

<sup>1/</sup>Exports before 1991 are to West Germany. Austria, Finland and Sweden are included as EU member states although accession did not occur until January 1, 1995.

## **SOUTH AFRICA**

South Africa's production of canned peaches for the 1994/95 season is forecast to have reached 80,000 tons, the highest level in six years. A large clingstone crop and a bonus scheme for quality contributed to a pack with a rating of 93-percent grade 1. Higher output is expected to support an export campaign of 65,000 tons in 1994/95. On the policy front, South Africa's Canning Fruit Board (CFB) continues but in a somewhat limited capacity in setting producer prices for fruit, grading standards, and seasonal delivery contracts between growers and processors.

## **AUSTRALIA**

Australia's canned peach production for 1994/95 is forecast at 32,000 tons, a slight decrease from the previous year due to poor export prospects resulting from a stronger Australian dollar and continued competition from subsidized EU product. The canning peach industry is hopeful the increase in high-density plantings will lead to cheaper fruit to canners and thereby improve Australia's competitiveness in export markets. Exports in 1994/95 are pegged at 13,000 tons, less than half the volume recorded six years ago. Tough competition from EU suppliers, especially from Greece, in important markets such as Japan and Canada continues to plague efforts.

The Australian canned peach industry remains concerned about the threat of losing its share of the Canadian market as a result of the North American Free Trade Agreement (NAFTA). The Australian government continues to press for similar tariff treatment from the Canadians under the Canada-Australia Trade Agreement (CANATA), which sets forth that tariffs on Australian product entering Canada should not exceed tariffs imposed on a third country. Canada accounted for about a third of Australia's total canned peach exports in 1994.

Imports have fallen sharply over the past two years, due mainly to action taken against China and Greece under provisions of the Australian

Anti-dumping Authority. The Authority concluded that imports of canned peaches from Spain and Greece had been sold at prices below the normal value in their respective markets. Countervailing duties were imposed on shipments of canned peaches from Spain and Greece, and anti-dumping duties were placed on product from Greece and China. The countervailing duties on canned peaches from Greece and Spain were calculated at A\$4.38 and A\$4.54 (US\$1.00 = A\$1.38, 3/15/95) per carton (24 kilograms gross), respectively. Most imports are destined for the lower-priced generic end of the market. However, the realization that market share was being eroded by lower cost imports led to the introduction of some locally packed generic lines. Buyer resistance to imported product because of higher cost due to CVD and anti-dumping duties appears not to have operated in 1994, as imports rebounded. A stronger Australian dollar may have been contributing factor.

### **AUSTRALIA: Canned Peach Imports by Origin (Calendar Years; Metric Tons, net wt.)**

Supplier	1990	1991	1992	1993	1994
China	1,775	1,308	1,347	16	27
Greece	2,068	1,922	980	0	1,382
Italy	0	0	0	235	1,191
United States	3	2	44	0	817
New Zealand	0	0	0	66	124
Others	229	351	174	2	219
<b>TOTAL</b>	<b>4,075</b>	<b>3,583</b>	<b>2,545</b>	<b>319</b>	<b>3,760</b>

Source: Australia Customs data, reported by FAS/Canberra

## **CHILE**

Excellent crop conditions in principal growing areas contributed to a higher peach output for canning and a slightly larger peach pack in 1995, forecast at 39,000 tons. Canned peaches are produced mainly for the more lucrative export market. Prospects for 1994/95 are good as a result of the reduced canning peach crop in Argentina, Chile's primary Latin American competitor. The export outlook depends to a large extent on economic developments in Latin American markets, which now take the bulk of Chilean canned peaches.

Prices of canning peaches have trended downward in recent years as production has increased and canners have sought to shave input costs. Preliminary data for 1994/95 indicate prices fell to as low as \$180/ton.

**Chile: Farm Prices for Canning Peaches  
(Currency/Metric Ton)**

Year	Chilean Peso	U.S. Dollar
1993	88,000	220.00
1994	86,000	200.00
1995	74,000	180.00

Note: Chile's inflation rate in 1994 was around 8.9 percent, down from 12.2 percent a year earlier.

Source: USDA/FAS report CI5009

Chile's canning industry has consolidated in recent years. There are now seven main canneries, of which five account for over 90 percent of production. The pack stretches from late December through the end of April. The five principal packing plants have expanded production capacity over the last few years.

**Chile: Installed Canned Peach Capacity  
(Metric Tons)**

Cannery	Estimated Capacity
Pentzke	18,000
Isasa	15,000
Malloa	14,000
Corpora	7,000
Nieto	7,000
Bozzolo	2,500
Wasil	2,500
Others 1/	1,000
<b>TOTAL</b>	<b>67,000</b>

1/ Small independents. Source: USDA/FAS report CI5009

The canning industry continues to reduce its dependency on labor through new technology and improved machinery. Real labor costs have also risen over the past several years. Exchange rates have also had an impact on prices. The appreciation of the Chilean peso vis-a-vis the U.S. dollar in recent years has led to cheaper inputs such as lower-cost imported tin and sugar.

**A Free Trade Agreement could boost sales of Chilean canned peaches to the United States**

Negotiations will soon begin toward an eventual U.S./Chile Free Trade Agreement. The U.S. canned peach industry has expressed concern about the potential negative impact of lower tariffs. As demand in the U.S. market is relatively price-inelastic, imports of lower cost product from Chile could displace domestic canned peaches without an increase in product demand.

**JAPAN**

**Domestic canned peach production continues downward spiral**

Production of canned peaches in 1994/95 is not expected to exceed 14,500 tons, another in a succession of declines this decade. This seeming slide into oblivion is attributed to high costs of production and attractive prices for fresh peaches in the domestic fruit market. Over the longer term, further production declines are expected as the farm population ages. Japanese canned peach production accounts for about 16 percent of total annual consumption, the balance coming from imports.

**Imports account for majority of domestic consumption**

Canned peach imports for 1994/95 are forecast at 75,000 tons, as recessionary pressures have sharply increased the attractiveness of low-priced foreign product. This move toward cheaper imports has primarily benefitted product from Greece, China, and, to a lesser extent, South Africa. These suppliers now collectively account for about 83 percent of the import market. The data for 1994 indicate significant gains in market share by these three suppliers. Over the past three seasons, China's impressive export campaigns appear to have been at prices that undercut even subsidized product from the EU.

**JAPAN: Imports of Canned Peaches Explode in Recent Years  
( Calendar Years/ Metric Tons)**

Supplier	1988	1989	1990	1991	1992	1993	1994
South Africa	13,749	12,941	10,350	11,937	12,066	11,885	13,911
Greece	11,200	15,241	10,076	10,657	14,172	16,088	24,887
China	361	726	1,958	6,719	4,145	13,289	23,975
Chile	1,320	2,636	2,839	5,210	5,522	3,321	3,148
Australia	6,302	3,834	4,148	5,144	3,561	2,772	2,340
Korea	2,257	3,146	2,233	2,498	960	590	433
United States	11,214	8,350	5,851	7,988	6,391	7,016	5,036
Others 1/	223	210	137	101	288	631	1,680
<b>TOTAL</b>	<b>46,626</b>	<b>47,084</b>	<b>37,592</b>	<b>50,254</b>	<b>47,105</b>	<b>55,592</b>	<b>75,410</b>

1/ Others are mostly Spain, Italy and France.

Source: Customs Bureau, Japan Ministry of Finance, in FAS post report JA4082

**JAPAN: Average Import Price of Canned Peaches by Country of Origin 1/  
(Yen/Kilogram, CIF 2/)**

Origin	1989	1990	1991	1992	1993	1994
Greece	116	135	138	135	118	97
South Africa	129	153	148	156	131	114
United States	161	189	173	175	148	139
Australia	139	140	156	164	133	139
China	131	115	150	123	99	93
Chile	142	140	156	179	150	110

Source: Customs Bureau, Ministry of Finance, GOJ, in FAS post report JA4082

1/ Average for retail size cans, mainly 2-1/2 and 303.

2/ Average exchange rate (yen to one US dollar): 1991 = 135; 1992 = 127; 1993 = 112; 1994 = 102.

## **CANNED PEARS**

The canned pear situation in 1994/95 is characterized by lower production, higher exports, and some drawing down of stocks. Total canned pear production in the six selected countries in 1994/95 is forecast at 150,235 tons, down about 10 percent from last year. Substantial declines in Italy and France account for most of the reduction. Indeed, of the reporting countries only Spain registered a significant year-on-year increase in production. Others reported declines. Despite lower outturn, prices were generally below the levels of the previous year. Aggressive pricing and the lower 1994/95 pack reflect the continued competitive situation in world markets. Total exports by the selected suppliers are expected to rise slightly in 1994/95 to about 102,805 tons. Somewhat improved demand is likely to result in a slightly lower stocks-to-use ratio.

### **EUROPEAN UNION**

The EU dominates the global canned pear industry. Collectively, the EU is both the world's largest producer and consumer of canned pears. Italy leads the EU in exports, primarily to other Community markets, especially Germany.

### **ITALY**

**Italy's subsidized canned pear industry is export driven**

Production for 1994/95 is forecast at 42,000 tons, a decline of about 29 percent from the previous year. The decline is mainly due to the drop in fresh fruit production. Reports of hail damage and heavy snow in the major pear-producing region of the Po River Valley have raised concern about prospects for the 1995 pear pack. Canned pear shippers continue to benefit from a devalued lira, which is expected to help buoy exports to 36,000 tons in 1994/95.

## SPAIN

Spanish canned pear production for 1994/95 is forecast to reach 26,100 tons, a 44 percent surge from the 1993 pack based on a larger pear crop. Indications from the 1995 pear crop point to higher volumes and generally good quality. Spain is expected to export about 7,800 tons in 1994/95, an increase of 15 percent above the previous year. The rise is attributed to a devaluation of the Spanish peseta. Spain ranks a distant second after Italy in terms of EU canned pear exports.

## AUSTRALIA

Production of canned pears for 1994/95 is forecast at 35,000 tons, down 14 percent from the previous year. This decline reflects lower yields due to dry weather and the continuing effects of the October 1993 flooding of the Goulburn Valley of Victoria and the closure of the Letona cannery.

The Australian canned pear industry is focused on exports, primarily to the EU and Japan. In Germany, the largest EU market, prices for Australian standard grade were offered at DM23-24/carton (24, 2 1/2 cans, C&F) in early April. Total exports in 1994/95 are forecast at 32,000 tons, down slightly from the previous year as lower-priced competitor product continues to displace Australian fruit. Australia shipped 1,339 tons of canned pears to the United States in 1994, the second season following the U.S. government's revaluation of dumping margin on imports of Australian canned Bartlett pears. Australian canned Bartlett pears have faced an anti-dumping order in the United States since 1973. However, currently there is no cash deposit required on Australian product as the dumping margin was determined to be zero, a factor that has encouraged imports.

Canned pear imports are forecast at only 100 tons in 1994/95, due in part to anti-dumping action on product from China and greater availability of locally packed generic fruit. Local consumer preference in canned product has shifted somewhat to lower-priced generic labels as a result of the economic downturn in Australia.

## SOUTH AFRICA

South Africa is also an export-oriented

producer of canned pears. Canned production in 1994/95 forecast to settle at 25,865 tons, about six percent below last year's pack on lower yields and irregularities in fruit size. The smaller pack is expected to limit export availabilities in the 1994/95 marketing year to about 25,000 tons.

## JAPAN

Japan relies on imports to meet needs for canned pears

The small scale of canned pear production in Japan approaches that of a cottage industry. Production for 1994/95 is forecast at 500 tons. Most pears grown in Japan are sand pears ("Nashi"), which are mainly marketed for fresh consumption. Japan will rely on imports to meet consumer demand from confectioners and restaurants, and for holiday gift-giving. The table below shows that Australia is the major supplier of canned pears to Japan.

**JAPAN: Canned Pear Imports by Origin**  
(Calendar Years; Metric Tons, net wt.)

Supplier	1989	1990	1991	1992	1993	1994
Australia	4,027	4,329	4,944	5,305	5,172	5,329
So. Africa	1,025	1,092	1,044	1,456	1,495	1,854
U.S.	298	478	619	527	543	445
China	141	73	57	174	53	403
Others	235	287	188	203	178	322
TOTAL	5,726	6,259	6,852	7,665	7,441	8,353

Source: Customs Bureau, Japan Min. of Finance

## CANNED FRUIT MIXTURES

The canned fruit mixtures situation is characterized by a moderate decline in production, falling exports, and some drawdown in stocks. Output of canned fruit mixtures in selected markets for 1994/95 is forecast at 181,265 tons. Lower deliveries to canneries in Greece and Italy account for most of the decline. EU countries pack about half the total output of the eight selected countries. Exports of canned fruit mixtures in 1994/95 are expected to reach 141,330 tons, a decline of about five percent from the previous year. Stocks are expected to decline to about 22,000 tons.

## **CANNED APRICOTS**

Total canned apricot production for 1994/95 in the four selected countries is forecast at 72,350 tons, a modest increase from the previous year. A return to a more usual Australian pack accounts for most of the rise in total production. Exports are expected to reach 68,800 tons, in line with larger exportable supplies. Ever lower volumes from Greece are anticipated as the Sharka virus spreads among the orchards. Activity from commercial buyers is plummeting, forcing packers to seek markets among industrial buyers for bakery and confectionery products. Supermarkets are responding to the lack of consumer demand and allocating less shelf space to canned apricots.

## **OUTLOOK FOR U.S. EXPORTS OF CANNED FRUIT**

The U.S. canned fruit industry will continue to face challenges both domestically and in export markets in the coming year. Exports continue to face keen competition from EU product. The following table presents aggregate U.S. exports of canned fruit by type. Mid-year figures for 1994/95 compared with the year earlier period show a decline in both volume and value for peaches, with modest volume gains in fruit mixtures and pears but at lower per unit values. Aggregate volume during the Jun/Jan period of 1994/95 fell by less than two percent from the same period in the previous year. The decline in total value was about seven percent, indicating lower prices than last year. Total export value in 1994/95 through January was \$34.5 million (FOB). The table shows that despite tough competition in world markets, the pace of U.S. canned pears and fruit mixtures held fairly steady compared with peaches.

**U.S. Canned Fruit Exports  
(Jun/May Year; Metric Tons, net wt.)**

	1990/91	1991/92	1992/93	1993/94	1993/94 (Jun/Jan)	1994/95 (Jun/Jan)
Mixtures	28,074	31,080	34,895	27,974	19,668	20,006
Peach	18,647	20,054	19,815	19,309	12,964	11,201
Pear	3,521	5,758	3,905	2,890	1,820	2,745
<b>TOTAL</b>	<b>50,242</b>	<b>56,892</b>	<b>58,616</b>	<b>50,173</b>	<b>34,452</b>	<b>33,952</b>

Source: U.S. Census Bureau data

## **CANNED FRUIT MIXTURES**

Fruit mixtures are the dominant element of U.S. trade in canned deciduous fruit. Exports in 1994/95 are slightly ahead of last year's rather disappointing campaign. Strategic U.S. export markets include Canada and various Asian countries. The following table shows that the pace of exports for the first half of the June 1994-May 1995 marketing year was similar to the year earlier period. However, the level of shipments to Singapore and the Philippines was far ahead of last year's campaign. High-cost producer Japan took advantage of comparatively lower priced imported canned fruit this past year. Increased competition from Australia and South Africa, and exchange rate movements in Canada and Japan, account for some of the fluctuation in these markets.

## **CANNED PEACHES**

The 1994 canned peach pack in California is revised at 334,573 tons, slightly below the level recorded the previous year (see table below).

### **Canned Peaches face stiff subsidized competition in important export markets**

Canned peach exports held up well during the 1993/94 season despite fierce competition from Greece. However, shipment data for the June 1994-January 1995 period suggests that exports will be down this year. Among the major markets for U.S. canned peaches are Japan, Canada, Mexico, Hong Kong, and Taiwan. Although shipments to Mexico during the first year of NAFTA implementation were at record levels, economic turmoil in 1995 will mean lower demand for U.S. canned peaches. This is reflected in the pace of shipments (Jun/Jan) this year. South American markets show some strength this year, but will likely remain erratic until their economies firm and import policies are reformed. Competition from an expanding Chile is expected to dampen growth in this region. In Asia, shipments to Korea are more than double the level at this time last year. Deliveries to other Asian markets are well below last year's pace.

### **Greek peaches have displaced U.S. product in strategic export markets**

Despite the implementation of NAFTA, there remains considerable concern that these markets will be eroded by shipments from subsidizing

suppliers. The chart on the following pages shows that our NAFTA neighbors and Japan are importing an increasingly larger share of canned peaches from Greece.

*(For further information on production, supply, and demand, contact Ross G. Kreamer, 202-720-9903. For information on marketing opportunities, contact Jayne Carbone, 202-720-0911. )*

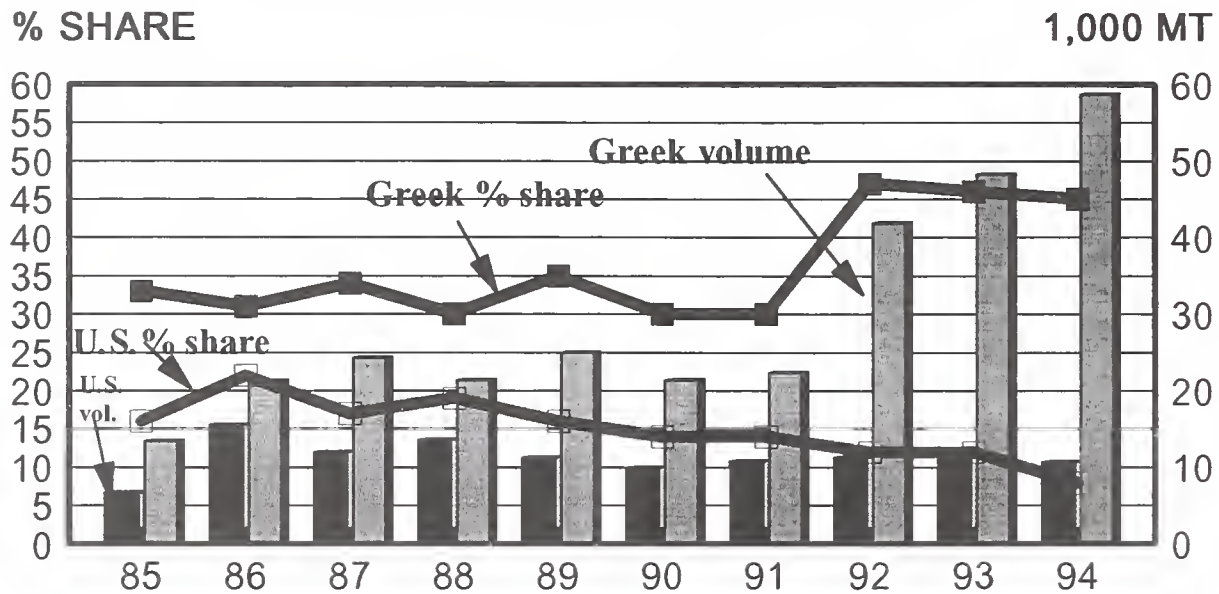
#### **Imports outstripped exports for past two years**

Demand for canned peaches in the United States is relatively price-inelastic. A recent study by the University of California/Berkeley (Moulton, 1995) states that, "lower prices do not stimulate a proportional increase in purchases and greater supplies cause a disproportionate decrease in prices." The report concludes that an increase in supply from a lowering of tariffs will cause a decrease in prices without an increase in demand. In fact, U.S. per capita consumption of canned peaches has declined from 1.94 kilograms in 1970/74 to 1.33 kilograms in 1990/94. The United States is a net importer of canned peaches, primarily from Greece. Recent import price quotes for Greek product at the wholesale level on the U.S. East Coast were \$2.00/case (24 2 1/2 cans) lower than offers of California product. Although U.S. product attracts a price premium on quality, the difference suggests pricing flexibility aside from quality factors. Other suppliers include Chile, and occasionally, Italy and Spain. Chile could take a larger share of the U.S. market after the U.S./Chile Free Trade Agreement is negotiated. As a lower-cost producer, Chile has the ability to ship canned peaches at prices below domestic U.S. product. South African canned peaches made an impressive showing in 1993/94, although the pace of deliveries this year suggests a lower volume in 1994/95.

#### **CANNED PEARS**

Canada, Japan, and Mexico are major markets for U.S. canned pears. Exports during 1993/94 declined 35 percent, largely on lower shipments to Japan. For 1994/95, the pace of shipments through January suggests that exports will rebound, but this will depend on demand from Mexico. Of future concern on the supply side is the growth potential for pear production in both Chile and Argentina. Limited expansion in the fresh market could result in diversion of pears to the canning industry. This is a development that will bear on future prospects for U.S. canned pears in export markets.

## GREEK PRODUCT HAS DISPLACED U.S. CANNED PEACHES IN STRATEGIC EXPORT MARKETS



Source: Import data from Canada (StatsCan), Mexico (SECOFI), and Japan (Customs).  
1/ Market share expressed as percentage; volume, in thousand metric tons.

### UNITED STATES: Canned Fruit Mixtures Exports (1988/89-1994/95; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94	1993/94 (Jun/Jan)	1994/95 (Jun/Jan)
Canada	4,758	3,830	7,809	7,770	6,542	5,677	4,253	3,131
Mexico	946	615	538	724	501	547	232	561
Japan	7,201	3,373	4,786	6,398	4,708	6,205	4,080	3,835
Hong Kong	1,433	929	2,782	3,593	3,753	3,999	2,771	2,661
Taiwan	447	376	649	984	1,709	1,106	958	684
Philippines	1,597	2,905	2,636	2,164	3,337	1,289	1,046	1,933
Singapore	1,403	1,798	2,105	2,089	2,662	2,575	1,898	3,812
Saudi Arabia	1,018	821	1,977	1,514	3,096	1,387	1,152	165
Panama	530	851	1,119	1,100	1,138	863	508	520
Sweden	304	789	753	709	898	289	176	156
Others	3,336	2,810	2,920	4,035	6,552	4,037	2,594	2,548
<b>TOTAL</b>	<b>22,973</b>	<b>19,097</b>	<b>28,074</b>	<b>31,080</b>	<b>34,896</b>	<b>27,974</b>	<b>19,668</b>	<b>20,006</b>

Source: U.S. Census Bureau data

1/ Marketing year is June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

**UNITED STATES: Canned Peach Exports**  
(1988/89-1994/95; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94	1993/94 (Jun/Jan)	1994/95 (Jun/Jan)
Canada	1,755	1,183	1,857	2,427	2,691	2,809	1,783	2,219
Mexico	273	1,653	653	1,581	1,775	1,400	1,303	331
Japan	9,013	5,850	7,420	7,593	5,812	5,674	3,144	2,361
Taiwan	3,154	1,569	2,654	2,702	2,460	1,719	1,163	976
Hong Kong	489	379	1,347	1,812	1,467	1,768	1,209	615
Singapore	499	941	597	640	754	1,194	1,046	691
Philippines	376	755	412	552	744	382	300	734
Panama	407	385	358	410	266	325	220	156
Colombia	19	29	73	267	58	98	80	49
Saudi Arabia	273	249	267	266	532	460	231	75
Others	1,278	1,365	3,009	1,804	3,256	3,480	2,485	2,994
<b>TOTAL</b>	<b>17,538</b>	<b>14,358</b>	<b>18,647</b>	<b>20,054</b>	<b>19,815</b>	<b>19,309</b>	<b>12,964</b>	<b>11,201</b>

Source: U.S. Census Bureau data

1/ Marketing year: June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

**UNITED STATES: Canned Peach Imports**  
(1988/89-1994/95; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94	1993/94 (Jun/Jan)	1994/95 (Jun/Jan)
Greece	11,038	21,208	9,074	17,608	19,021	15,515	9,695	9,703
Chile	4,420	9,750	4,527	879	879	1,076	1,021	1,138
Argentina	1,030	4,666	107	349	373	44	3	18
Spain	1,129	2,803	91	142	986	829	576	162
Italy	69	1,428	0	0	18	316	314	2
Mexico	292	675	990	1	0	0	0	0
South Africa	0	0	0	116	382	3,319	2,057	1,398
Others	253	652	229	166	262	112	56	215
<b>TOTAL</b>	<b>18,231</b>	<b>41,182</b>	<b>15,018</b>	<b>19,261</b>	<b>21,921</b>	<b>21,211</b>	<b>13,722</b>	<b>12,636</b>

Source: U.S. Census Bureau data

1/ Marketing year: June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

**UNITED STATES: Canned Pear Exports**  
(1988/89-1994/95; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94	1993/94 (Jun/Jan)	1994/95 (Jun/Jan)
Canada	96	259	552	1,288	1,508	1,554	944	1,495
Mexico	9	362	239	381	321	164	148	18
France	0	0	0	1,801	76	5	5	0
Italy	0	17	6	118	0	0	0	9
Denmark	0	0	195	245	71	0	0	0
Sweden	17	19	325	291	140	4	2	0
Japan	221	442	916	845	506	402	206	236
Singapore	62	82	147	109	76	88	58	57
Costa Rica	9	26	106	188	111	137	99	0
Others	617	580	1,035	492	1,096	536	358	930
<b>TOTAL</b>	<b>1,031</b>	<b>1,787</b>	<b>3,521</b>	<b>5,758</b>	<b>3,905</b>	<b>2,890</b>	<b>1,820</b>	<b>2,745</b>

Source: U.S. Census Bureau data

1/ Marketing year: June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

**U.S. Cling Peach Situation and Outlook 1/**  
(Metric Tons)

	1991/92	1992/93	1993/94	1994/95
Deliveries to				
Canners	452,082	517,123	479,909	485,809
Paid tons Packed	424,454	487,263	452,494	464,684
Peach Pack 2/	345,132	406,654	369,014	400,081
Beginning Stocks	46,356	30,618	65,319	65,319
Imports	19,261	21,921	21,211	21,000
Total Supply 3/	410,749	459,193	455,544	486,400
Apparent Consumption 4/	360,077	374,059	370,916	n/a
Exports	20,054	19,815	19,309	18,000
Ending Stocks 5/	30,618	65,319	65,319	n/a

Source: California Cling Peach Advisory Board, 1995, and U.S. Census data

1/ Data show trends in the U.S. situation; 1994/95 data are forecast.

2/ Pack estimates are for crop year in California.

3/ Accounts only for California production, which is about 98 percent of total U.S. pack.

4/ Total supply less exports and stocks held by canners.

5/ Ending stocks are supplies held by canners at end of season.

## Canned Peaches: Production, Supply, and Distribution (Metric Tons, net weight)/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
<b>France</b>							
1990/91	3,800	34,300	31,500	69,600	2,700	61,600	5,300
1991/92	5,300	31,400	27,800	64,500	3,800	57,700	3,000
1992/93	3,000	32,200	24,500	59,700	4,000	51,300	4,400
1993/94	4,400	27,520	23,610	55,530	5,110	47,420	3,000
1994/95	3,000	23,500	26,000	52,500	6,000	45,000	1,500
<b>Greece</b>							
1990/91	35,500	251,876	604	287,980	247,767	16,713	23,500
1991/92	23,500	317,542	514	341,556	309,836	18,720	13,000
1992/93	13,000	372,697	275	385,972	312,875	17,097	56,000
1993/94	56,000	288,597	2,500	347,097	310,000	10,097	27,000
1994/95	27,000	373,500	500	401,000	360,000	7,000	34,000
<b>Italy</b>							
1990/91	46,600	72,000	11,300	129,900	41,200	51,000	37,700
1991/92	37,700	81,000	11,400	130,100	44,000	51,000	35,100
1992/93	35,100	98,000	9,000	142,100	40,000	48,000	54,100
1993/94	54,100	55,000	8,600	117,700	42,000	45,000	30,700
1994/95	30,700	50,000	9,000	89,700	42,000	42,000	5,700
<b>Spain</b>							
1990/91	18,203	65,000	8,912	92,115	8,301	77,000	6,814
1991/92	6,814	91,400	6,713	104,927	9,758	79,169	16,000
1992/93	16,000	131,500	1,800	149,300	20,900	93,400	35,000
1993/94	35,000	105,700	1,200	141,900	36,500	94,500	10,900
1994/95	10,900	112,500	2,200	125,600	33,000	92,600	0
<b>Total EU</b>							
1990/91	104,103	423,176	52,316	579,595	299,968	206,313	73,314
1991/92	73,314	521,342	46,427	641,083	367,394	206,589	67,100
1992/93	67,100	634,397	35,575	737,072	377,775	209,797	149,500
1993/94	149,500	476,817	35,910	662,227	393,610	197,017	71,600
1994/95	71,600	559,500	37,700	668,800	441,000	186,600	41,200
<b>Argentina</b>							
1990/91	1,149	31,000	4,000	36,149	1,889	34,111	149
1991/92	149	49,000	8,622	57,771	7,761	48,370	1,640
1992/93	1,640	31,000	31,535	64,175	921	58,254	5,000
1993/94	5,000	52,000	9,000	66,000	6,000	58,000	2,000
1994/95	2,000	45,000	15,000	62,000	2,000	58,500	1,500
<b>Australia</b>							
1990/91	9,492	30,000	3,583	43,075	19,770	18,900	4,405
1991/92	4,405	31,600	2,545	38,550	13,619	18,900	6,031
1992/93	6,031	34,600	319	40,950	12,700	18,500	9,750
1993/94	9,750	32,900	3,760	46,410	10,348	19,000	17,062
1994/95	17,062	32,000	3,000	52,062	13,000	20,000	19,062
<b>Chile</b>							
1990/91	950	24,000	0	24,950	17,000	7,600	350
1991/92	350	31,000	0	31,350	20,200	10,000	1,150
1992/93	1,150	34,200	0	35,350	24,543	10,500	307
1993/94	307	38,000	0	38,307	27,438	10,500	369
1994/95	369	39,000	0	39,369	28,200	10,800	369

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<b>Japan</b>							
1990/91	6,000	20,927	42,189	69,116	10	66,106	3,000
1991/92	3,000	22,208	53,569	78,777	5	68,772	10,000
1992/93	10,000	19,148	45,428	74,576	3	64,573	10,000
1993/94	10,000	18,147	65,551	93,698	8	89,690	4,000
1994/95	4,000	14,500	75,000	93,500	10	88,490	5,000

<b>South Africa</b>							
1990/91	29,722	65,815	0	95,537	56,679	11,650	27,208
1991/92	27,208	65,557	0	92,765	50,840	11,857	30,068
1992/93	33,538	74,619	0	108,157	56,134	11,875	40,148
1993/94	40,148	65,394	0	105,542	60,000	12,042	33,500
1994/95	33,500	80,000	0	113,500	65,000	12,000	36,500

<b>TOTAL</b>							
1990/91	151,416	594,918	102,088	848,422	395,316	344,680	108,426
1991/92	108,426	720,707	111,163	940,296	459,819	364,488	119,459
1992/93	119,459	827,964	112,857	1,060,280	472,076	373,499	214,705
1993/94	214,705	683,258	114,221	1,012,184	497,404	386,249	128,531
1994/95	128,531	770,000	130,700	1,029,231	549,210	376,390	103,631

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1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

2/ MY 1994/95 includes 1994 packs in Northern Hemisphere and late 1994 and early 1995 packs in Southern Hemisphere.

## Canned Pears: Production, Supply, and Distribution (Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
<b>France</b>							
1990/91	6,900	24,500	20,800	52,200	1,400	43,400	7,400
1991/92	7,400	18,400	25,800	51,600	1,500	46,200	3,900
1992/93	3,900	28,500	17,700	50,100	900	42,100	7,100
1993/94	7,100	27,440	19,390	53,930	1,990	42,000	9,940
1994/95	9,940	20,770	21,000	51,710	2,000	42,000	7,710
<b>Italy</b>							
1990/91	7,360	53,000	2,470	62,830	32,760	15,500	14,570
1991/92	14,570	34,000	2,480	51,050	29,700	15,000	6,350
1992/93	6,350	76,000	1,000	83,350	33,000	15,000	35,350
1993/94	35,350	59,000	0	94,350	33,000	15,000	46,350
1994/95	46,350	42,000	0	88,350	36,000	15,000	37,350
<b>Spain</b>							
1990/91	0	11,800	309	12,109	5,758	6,351	0
1991/92	0	8,800	343	9,143	4,443	4,700	0
1992/93	0	16,200	1,000	17,200	6,400	6,200	4,600
1993/94	4,600	14,900	200	19,700	6,800	6,400	6,500
1994/95	6,500	26,100	170	32,770	7,800	6,870	18,100
<b>TOTAL EU</b>							
1990/91	14,260	89,300	23,579	127,139	39,918	65,251	21,970
1991/92	21,970	61,200	28,623	111,793	35,643	65,900	10,250
1992/93	10,250	120,700	19,700	150,650	40,300	63,300	47,450
1993/94	47,050	101,340	19,590	167,980	41,790	63,400	62,790
1994/95	62,790	88,870	21,170	172,830	45,800	63,870	63,160
<b>Australia</b>							
1990/91	16,946	42,000	580	59,526	41,466	6,000	12,060
1991/92	12,060	55,000	858	67,918	41,709	7,000	19,209
1992/93	19,209	44,900	63	64,172	32,191	9,000	22,981
1993/94	22,981	36,700	72	59,753	32,291	10,000	17,462
1994/95	17,462	35,000	100	52,562	32,000	10,000	10,562
<b>Japan</b>							
1990/91	600	556	6,948	8,104	19	7,385	700
1991/92	700	571	7,411	8,682	10	7,872	800
1992/93	800	585	6,763	8,148	14	7,634	500
1993/94	500	490	7,423	8,413	5	8,108	300
1994/95	300	500	7,800	8,600	5	8,295	300

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**Canned Pears: Production, Supply, and Distribution, cont.**  
**(Metric Tons, net weight) 1/**

**South Africa**

1990/91	7,292	27,668	0	34,960	25,104	2,876	6,980
1991/92	6,980	20,798	0	27,778	23,786	2,902	1,090
1992/93	1,090	28,635	0	29,725	22,033	2,879	4,813
1993/94	4,813	27,574	0	32,387	23,000	2,987	6,400
1994/95	6,400	25,865	0	32,265	25,000	3,000	4,265

**TOTAL**

1990/91	39,098	159,524	31,107	229,729	106,507	81,512	41,710
1991/92	41,710	137,569	36,892	216,171	101,148	83,674	31,349
1992/93	31,349	194,820	26,526	252,695	94,538	82,813	75,344
1993/94	75,344	166,104	27,085	268,533	97,086	84,495	86,952
1994/95	86,952	150,235	29,070	266,257	102,805	85,165	78,287

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

2/ The 1994/95 marketing year includes 1994 packs in the Northern Hemisphere and late 1994 and early 1995 packs in the Southern Hemisphere.

**Note:** Data for the United States are no longer available.

# Canned Fruit Mixtures: Production, Supply, and Distribution (Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumptn.	Ending Stocks
<b>France</b>							
1990/91	10,300	24,900	31,400	66,600	5,000	50,400	11,200
1991/92	11,200	23,000	27,900	62,100	5,900	47,400	8,800
1992/93	8,800	24,400	31,400	64,600	7,100	45,300	12,200
1993/94	12,200	24,790	32,940	69,930	11,740	45,000	13,190
1994/95	13,190	16,670	33,000	62,860	15,000	44,000	3,860
<b>Greece</b>							
1990/91	503	22,618	29	23,150	20,748	1,500	902
1991/92	902	26,930	151	27,983	25,793	1,400	790
1992/93	790	22,440	328	23,558	19,306	1,300	2,952
1993/94	2,952	11,180	500	14,632	12,500	1,200	932
1994/95	932	5,500	750	7,182	5,500	1,200	482
<b>Italy</b>							
1990/91	15,200	72,000	1,060	88,260	62,620	25,640	0
1991/92	0	75,000	1,500	76,500	58,000	18,500	0
1992/93	0	78,000	1,300	79,300	62,500	16,800	0
1993/94	0	73,000	1,900	74,900	64,000	10,900	0
1994/95	0	66,000	2,000	68,000	58,000	10,000	0
<b>TOTAL EU</b>							
1990/91	26,003	119,518	32,489	178,010	88,368	77,540	12,102
1991/92	12,102	124,930	29,551	166,583	89,693	67,300	9,590
1992/93	9,590	124,840	33,028	167,458	88,906	63,400	15,152
1993/94	15,152	108,970	35,340	159,462	88,240	57,100	14,122
1994/95	14,122	88,170	35,750	138,042	78,500	55,200	4,342
<b>Argentina</b>							
1990/91	na	na	na	na	na	na	585
1991/92	585	7,000	242	7,827	135	6,692	1,000
1992/93	1,000	9,500	834	11,334	3	11,031	300
1993/94	300	11,000	500	11,800	300	11,000	500
1994/95	500	12,000	500	13,000	400	12,300	300
<b>Australia</b>							
1990/91	1,769	30,400	0	32,169	21,035	10,900	234
1991/92	234	34,100	0	34,334	22,014	12,000	320
1992/93	320	32,200	0	32,520	17,102	13,700	1,718
1993/94	1,718	28,700	0	30,418	16,363	12,000	2,055
1994/95	2,055	28,000	0	30,055	17,000	12,000	1,055
<b>Chile</b>							
1990/91	50	3,100	0	3,150	2,800	300	50
1991/92	50	2,650	0	2,700	2,350	310	40
1992/93	40	4,150	0	4,190	3,865	310	15
1993/94	15	5,600	0	5,615	5,291	310	14
1994/95	14	5,750	0	5,764	5,420	320	24

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**Japan**

1990/91	1,000	4,173	10,197	15,370	0	13,870	1,500
1991/92	1,500	3,370	11,098	15,968	0	13,968	2,000
1992/93	2,000	3,023	9,390	14,413	2	13,411	1,000
1993/94	1,000	2,511	12,068	15,579	12	15,067	500
1994/95	500	2,300	13,000	15,800	10	15,290	500

**South Africa**

1990/91	5,377	42,378	0	47,755	37,229	4,961	5,565
1991/92	5,565	50,372	0	55,937	34,085	4,954	16,898
1992/93	16,898	48,494	0	65,392	41,210	4,970	19,212
1993/94	19,212	43,188	0	62,400	39,149	5,750	17,501
1994/95	17,501	45,045	0	62,546	40,000	6,750	15,796

**TOTAL**

1990/91	34,199	199,569	42,686	276,454	149,432	107,571	20,036
1991/92	20,036	222,422	40,891	283,349	148,277	105,224	29,848
1992/93	29,848	222,207	43,252	295,307	151,088	106,822	37,397
1993/94	37,397	199,969	47,908	285,274	149,355	101,227	34,692
1994/95	34,692	181,265	49,250	265,207	141,330	101,860	22,017

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1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

2/ The 1994/95 marketing year includes 1994 packs in the Northern Hemisphere and late 1994 and early 1995 packs in the Southern Hemisphere.

**note:** Data for the United States are no longer available.

# Canned Apricots: Production, Supply, and Distribution (Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
<b>Australia</b>							
1990/91	4,007	8,700	905	13,612	2,645	7,200	3,767
1991/92	3,767	9,800	1,255	14,822	1,860	7,000	5,962
1992/93	5,962	12,000	710	18,672	1,938	8,600	8,134
1993/94	8,134	2,900	1,633	12,667	651	9,000	3,016
1994/95	3,016	9,000	700	12,716	1,200	9,000	2,516
<b>Greece</b>							
1990/91	308	47,353	109	47,769	38,224	1,200	8,346
1991/92	8,346	36,730	22	45,098	43,091	1,100	907
1992/93	907	45,782	210	46,899	38,015	1,200	7,684
1993/94	7,684	27,353	200	35,237	27,000	1,200	7,037
1994/95	7,037	23,700	200	30,937	27,000	1,200	2,737
<b>South Africa</b>							
1990/91	2,675	16,720	0	19,395	15,900	745	2,750
1991/92	2,750	24,308	0	27,058	16,782	758	9,518
1992/93	9,518	24,247	0	33,765	21,273	765	11,727
1993/94	11,727	25,696	0	37,423	25,000	773	11,650
1994/95	11,650	24,500	0	36,150	30,000	775	5,375
<b>Spain</b>							
1990/91	13,076	12,000	75	25,151	8,196	5,500	11,455
1991/92	11,455	28,595	208	40,258	29,294	5,464	5,500
1992/93	5,500	17,700	100	23,300	17,600	4,500	1,200
1993/94	1,200	13,800	100	15,100	10,300	4,800	0
1994/95	0	15,150	100	15,250	10,600	4,450	200
<b>Total</b>							
1990/91	20,066	84,773	1,089	105,928	64,965	14,645	26,318
1991/92	26,318	99,433	1,485	127,236	91,027	14,322	21,087
1992/93	21,887	99,729	1,020	122,636	78,826	15,065	28,745
1993/94	28,745	69,749	1,933	100,427	63,351	15,373	21,703
1994/95	21,703	72,350	1,000	95,053	68,800	15,425	10,828

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans.

2/ The 1994/95 marketing year includes 1994 packs in the Northern Hemisphere and late 1994 and early 1995 packs in the Southern Hemisphere.

Note: Data for the United States are no longer available.

## Tree Nut Situation In Selected Countries

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Macadamia production and exports continue to increase due to strong international demand and favorable prices. Macadamia exports by selected countries in 1994/95 are forecast to increase 23 percent over the previous year to 23,910 metric tons. Australia is by far the world's largest exporter of macadamias, accounting for more than half of the world total. Australia is the second largest producer, preceded by the United States. The United States is a major importer of macadamias to meet domestic consumption needs. Consumers throughout the world purchase macadamias as a snack, for use in cooking, and as an ingredient in bakery goods, ice cream, and confectionery products. The 1994/95 selected country walnut, hazelnut, and almond export forecasts are all revised upward from last reported, due to stronger than expected world demand, particularly from the European Union. The United States is expected to account for most of the increase in walnut and almond export forecasts.

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### ***Macadamia Nuts***

In 1994/95, production, inshell basis, of macadamias among the world's seven leading suppliers is forecast to increase 16 percent over the revised 1993/94 harvest. The United States and Australia are the world's two largest producers of macadamias. Kenya, Costa Rica, and Guatemala have developing macadamia industries.

Macadamia exports by selected countries in 1994/95 are expected to increase 23 percent to 23,910 tons. The 1992/93 and 1993/94 export estimates were reduced based on a revision in U.S. trade data. Australia is by far the world's largest macadamia exporter, accounting for more than half of the total. Kenya ranks second, while the United States is third.

World demand for macadamias continues to increase. Many consumers around the world buy this nut as a snack, an ingredient for cooking, and indirectly as an ingredient in bakery and confectionery products.

### ***United States***

U.S. production of macadamias in 1994/95 is expected to increase 6 percent to 22,680 tons. This production, exclusively from Hawaii, accounts for 40 percent of total world output.

Harvested area in Hawaii remained stable at 7,487 hectares in 1994/95, but yields increased slightly because of greater rainfall. Macadamia production should continue to expand over the next few years as trees planted in the mid-1980s reach full productivity. However, future plantings may be limited by increased world competition. As sugarcane production decreases in Hawaii, some of this acreage may be diverted to macadamias.

In 1994/95, U.S. exports of macadamias are expected to drop 8 percent, after plummeting 36 percent in 1993/94. Macadamia export numbers for the United States include only prepared or preserved macadamias. U.S. suppliers do not export any unprocessed macadamias.

The share of U.S. exports to domestic production will likely contract from 13 percent in 1993/94 to 11 percent in 1994/95. The emergence of lower-cost foreign competitors has weakened demand for U.S. macadamias. The significant U.S. export markets are Japan, Canada, Korea, Taiwan, and the European Union (EU).

U.S. imports in 1994/95 are forecast to fall 17 percent below the 1993/94 level. Shelled macadamias represent 94 percent of all imports. Major import suppliers are Australia, Guatemala, and South Africa.

## ***Australia***

Australia remains the world's second largest macadamia producer, slightly below U.S. output, accounting for 39 percent of production of the seven selected countries. The average size of an Australian macadamia plantation is about 40 hectares, compared with a Hawaiian average of 4 hectares. In 1993/94, Australia increased its number of bearing macadamia trees to 1.2 million, up 20 percent. Most Australian macadamia enterprises have room for expansion, while Hawaiian growers would have to increase acreage by displacing other crops. Before the year 2000, Australia will likely harvest a 30,000-ton crop.

In past years, yields in Australia have tended to be lower than those in Hawaii, because most Hawaiian trees were already mature and, therefore, achieve higher yields. However, Australia's average yield is rising as trees mature and new varieties are planted that are better suited to the Australian climate.

Australian exports of macadamias have been increasing and may reach 12,000 tons in 1994/95. The U.S. market, which absorbed 40 percent of all Australian exports in 1993/94, remains important for Australian macadamia growers. Nevertheless, exports to Japan (24 percent of the total tonnage) and Hong Kong (16 percent) are accelerating.

## ***Brazil***

This country continues its expansion of macadamia tree planting. However, the 1994/95 crop is forecast to decrease 10 percent. A frost in Sao Paulo, affecting an estimated 30,000 trees during flowering, and an extended drought reduced the harvest.

With normal growing conditions, macadamia production should continue to expand through the end of the decade. Of the 6,200 hectares currently planted, an estimated 5,000 hectares contain non-bearing macadamia trees.

Brazilian growers hope to take advantage of their lower cost of production. One estimate indicates that, for orchards in production at least 13 years, Brazilian farmers spend about \$1.09 per kilogram to produce macadamias, while Hawaiian growers spend \$1.83 per kilogram.

Currently, Brazil does not commercially export macadamias. Inadequate quality standards pose

a problem for such potential exports. Growers are investing in technology to improve the quality of their macadamias.

## ***Costa Rica***

Production of macadamias has risen steadily since 1979/80. In 1994/95, output is forecast at 3,200 tons, 16 percent higher than the revised 1993/94 output. This larger crop is mainly due to higher yields from maturing trees. By the 1996/97 harvest, most of the area planted to macadamias will be in full production with a projected output of 6,000 tons.

Yields in Costa Rica average less than 1 ton per hectare. This low yield reflects the abandonment of many plantations in response to low prices during the 1990s. In addition, widespread infestations of chinch--an insect that bores into the nut during a critical period of its development or at maturity--reduced production. When chinch attack a mature tree, the nuts fall to the ground, resulting in damage or lower quality. The processing plants are sponsoring research to determine the effectiveness of biological controls to combat this pest.

Costa Rican macadamia exports in 1994/95 are expected to rise 39 percent to 2,500 metric tons. During 1993/94, important customers included the United States (68 percent of the total volume), Guatemala and the EU (both 14 percent), as well as Japan (4 percent).

Though the Costa Rican macadamia industry remains export oriented, domestic consumption of macadamias has risen steadily. Most Costa Ricans consume macadamias as snacks. The confectionery and ice cream industries are also increasing macadamia purchases.

## ***Guatemala***

Central America's second largest producer has consistently expanded its output of macadamias. In 1994/95, production of macadamias in Guatemala rose 6 percent over 1993/94 due to increasing yields from maturing trees. Of the 3,080 hectares planted to macadamias in 1994/95, growers will harvest only 950.

During the next several years, macadamia output will expand significantly as more plantings come into bearing, and average yields rise as trees mature. Macadamias are harvested year-round with peak production from May through August.

Like Costa Rica, Guatemala emphasizes the export market. This approach compels Guatemalan farmers to improve the quality of their macadamias. The U.S. market absorbs 90 percent of total Guatemalan exports.

In 1994, Costa Rican macadamia growers exported 258 metric tons of nuts to Guatemala. This transaction was made by some farmers who were discouraged from selling domestically due to slow payment by Costa Rican shellers.

### **Kenya**

Kenya may soon emerge as the world's third largest macadamia producer with 6 percent of total output. In 1994/95, Kenya's production of macadamias is forecast to increase 17 percent over the 1993/94 output. This upturn reflects favorable weather in the major growing regions, limited insect damage during the flowering period, and higher yields from trees planted in the mid-1980s, which are now beginning to bear significantly more nuts.

Small-scale farmers work more than 90 percent of the 5,750 hectares planted to macadamias. These growers generally intercrop macadamias with coffee, bananas, corn, and beans due to the limited availability of arable land. Harvesting macadamias is a year-round activity in Kenya, but the heaviest harvest period is from March through June.

Consumers in Kenya buy relatively few macadamias. Most production enters the export market, which increasingly consists of Germany and the United States. Meanwhile, exports to Japan are shrinking due to an aggressive marketing strategy targeting Germany and the United States. In 1994/95, Kenya's exports are forecast to rise 7 percent above the 1993/94 volume.

In 1992, a new processor entered the industry. This event has markedly improved the long-term outlook for both production and exports. Previously, Kenya had only one processor. The new entrant will substantially increase its shelling capacity and double the size of its warehouse. Competition between the two processors has greatly improved profit margins for growers. Only a shortage of seedlings and competition for land with other cash crops constrain further expansion of the Kenyan macadamia industry.

### **South Africa**

A prolonged drought has slowed expansion of South African macadamia output. Nevertheless,

1994/95 production is forecast at 2,200 tons, 10 percent above the revised 193/94 output.

Production in 1994/95 was initially forecast at 5,000 metric tons, but the drought cut this estimate by more than half. However, with normal rain and improved irrigation, the South African crop may exceed 9,000 tons by 2000/01.

### **Walnuts**

Walnut production in selected countries in 1994/95 is forecast at 520,140 tons, inshell basis, 1 percent above the forecast published in the December 1994 issue of World Horticultural Trade & U.S. Export Opportunities. Slightly larger harvests in the United States, France, and Italy account for most of the likely greater output.

A 5-percent gain in the export forecast from December for the selected countries reflects increased world demand. The United States is expected to account for most of this increase.

The 1994/95 forecast for walnut imports throughout the world declined 25 percent from the previous forecast. A smaller harvest in China and unfavorable exchange rates for product imported from the EU are the reasons for the expected lower total imports in 1994/95.

### **United States**

The marketing year (August-July) 1994/95 walnut production estimate was revised upward by 3 percent to 205,140 tons but is still 13 percent below the previous year's level. U.S. 1994/95 consumption is expected to increase 2 percent from the previous forecast due to greater demand for walnuts in the confectionery industry.

The 1994/95 U.S. walnut export forecast was increased from 97,000 to 102,000 tons based on the higher production forecast and stronger world demand. U.S. walnut exports to date (August-February) were 89,430 tons, 19 percent above the same period a year ago. The United States exports about half of its walnuts. Almost 79 percent of U.S. walnuts are exported in shell. Foreign purchasers consume U.S. walnuts as a seasonal snack. The main export markets are the EU, Brazil, and Canada.

Imports, which consist mainly of shelled walnuts, increased in 1992/93 due to a short U.S. crop that year. The following year imports were spillover from the previous year. The 1994/95

import forecast represents a more usual volume.

### **Chile**

Chile's production of walnuts has increased yearly. Despite a downward revision in the 1994/95 production forecast, output is still forecast 5 percent above the previous year. These gains come primarily from higher yields from improved varieties of trees.

Like many other countries producing tree nuts, Chile exports most of its output. Chile's walnut exports in 1994/95 are forecast to increase based on the larger output. In 1993/94, significant customers included Brazil (32 percent of the total tonnage), the EU (30 percent), and Argentina (30 percent).

Most Chilean retail consumers prefer shelled walnuts, available in almost every retail food store and among many street vendors. The bakery, chocolate, and dairy industries all purchase substantial quantities of walnuts for their products.

### **France**

Good weather contributed to an increased forecast for French production of walnuts in marketing year 1994/95, up 6 percent from the December 1994 forecast. In 1994/95, French walnut exports are expected to be 13 percent above the December forecast based on a larger crop. In 1993/94, the largest export markets were the EU (62 percent of the total volume) and Switzerland (21 percent).

### **Hazelnuts**

The 1994/95 hazelnut production estimate, inshell basis, for selected countries is essentially unchanged from the forecast published in the October 1994 issue of World Horticultural Trade & U.S. Export Opportunities. Turkey is the world's largest producer, followed by Italy.

An increase of 15,000 tons in Turkey's 1994/95 estimated beginning stocks of hazelnuts moderated the apparent major decline in the beginning stocks. Turkish producers built stocks due to lower domestic prices caused by sales of government-owned reserves of hazelnuts.

In 1994/95, exports from the world's four principal suppliers are forecast to increase 13 percent from the October 1994 forecast. Turkey is expected to account for nearly all of this increase. Most exports will likely enter the EU

where demand for hazelnuts in the food manufacturing industry is strong.

### **United States**

The 1994/95 hazelnut crop estimate was increased 5 percent to 18,144 tons. The impact of a hot, dry summer did not reduce production as much as earlier expected.

The U.S. hazelnut export forecast was increased 5 percent due to the larger crop. However, competition from Turkish hazelnuts may constrain U.S. export growth. In 1993/94, about half of all U.S. hazelnut exports were in shell. For the coming marketing year, in-shell nuts may reach 62 percent of exports.

The three major U.S. customers are expected to be the EU, Canada, and Brazil. Industrial purchasers of shelled hazelnuts in the EU use hazelnuts as an ingredient in bakery and confectionery products.

The 1994/95 U.S. hazelnut import forecast was reduced 37 percent to 7,600 tons with most of the decrease expected to be for shelled nuts. Declining demand among U.S. bakery, confectionery, and ice cream manufacturers is expected to contribute to the slowing of imports. Turkey will likely supply 94 percent of all U.S. hazelnut imports.

### **Turkey**

The 1994/95 hazelnut crop forecast is unchanged from October and 60 percent above the drought-reduced 1993/94 harvest. Turkey remains the world's largest producer, accounting for 70 percent of total selected country output.

Turkey's 1994/95 hazelnut export forecast was increased 17 percent to 350,000 tons, due to a larger crop and greater demand from the EU. The four major customers for Turkish hazelnuts in 1993/94 were the EU (86 percent of the total tonnage), Austria (4 percent), Russia (2 percent), and the United States (1 percent). Bakery and confectionery companies in the EU purchase most of Turkey's hazelnuts. The U.S. bakery industry also uses Turkish hazelnuts.

Turkey operates a government cooperative (FISKOBIRLIK) for hazelnuts. The Turkish government set its initial 1994/95 support price for unshelled hazelnuts at TL 45,000 (U.S. \$1.44) per kilogram but subsequently raised it to TL 55,000 (U.S. \$1.36) per kilogram due to a devaluation of the Turkish lira. By comparison, shelled, roasted hazelnuts retail for about TL

300,000 (U.S. \$7.40) per kilogram.

FISKOBIRLIK is reducing its inventory of hazelnuts, either by selling its stocks in the domestic market or crushing nuts for oil. Government hazelnuts sold in the Turkish domestic market were depressing local prices. As a result, Turkish farmers have been withholding supplies from the market, while FISKOBIRLIK was depleting its excess stocks.

## ***Almonds***

Almond production in selected countries in 1994/95 is forecast at 433,074 metric tons, shelled basis, down less than one percent from the forecast published in the October 1994 issue of World Horticultural Trade & U.S. Export Opportunities. A sharp decrease in Spanish output more than offset an expected larger harvest in the United States.

Total 1994/95 almond exports from selected countries are forecast at 225,400 metric tons, up 2 percent from the October 1994 forecast. The United States, Greece, and Morocco are expected to account for these additional exports.

The ending stock forecast for selected countries for 1994/95 has been increased 20 percent due primarily to a significant buildup in U.S. stocks. With a larger U.S. crop and expected lower consumption, U.S. ending stocks are expected to rise 75 percent from 1993/94 but only 21 percent higher than the previous forecast.

## ***United States***

The U.S. almond crop estimate for 1994/95 is increased 3 percent to about 300,000 tons. Good weather and a 2-percent increase in bearing acreage contributed to the higher crop estimate.

The U.S. almond consumption forecast for 1994/95 was reduced by 13 percent to 81,647 tons. Manufacturers of bakery, confectionery, and ice cream products have somewhat diversified their procurement of tree nuts which has placed competitive pressure on almonds. Meanwhile, some domestic consumers have shifted to other snacks as options to prepared and preserved almonds.

The U.S. almond export forecast for 1994/95 has been increased from 175,000 to 188,000 tons based on a larger U.S. harvest and higher exports to date than earlier expected. U.S. almond exports to date (July 1994 to February 1995) totalled 134,000 tons, 36 percent above

the same period last year.

In 1994/95, shelled almonds (excluding prepared and preserved) are expected to account for 79 percent of total U.S. almond exports. Principal U.S. customers for shelled almonds include the EU, Japan, Canada, Taiwan, and India.

Strong demand among food processors in the EU, favorable foreign exchange rates, and lower trade barriers, should contribute to higher U.S. shelled almond exports. U.S. exports to India may increase, since the Government of India has reduced its tariff on almonds in retail packages from 65 percent to 50 percent but kept unchanged its specific tariffs on shelled and unshelled almonds.

The U.S. export market for prepared or preserved almonds continues to weaken after a 6-percent drop in tonnage during 1993/94. In 1994/95, exports are forecast to decline almost 40 percent to 31,000 tons. Prepared or preserved almonds primarily enter the retail market, and many foreign consumers have readily available substitutes, including bakery goods, confections, and extruded snacks. Main U.S. customers for prepared and preserved almonds in 1994/95 are expected to be the EU, Japan, Canada, Norway, and Australia.

## ***Spain***

Spain's 1994/95 almond harvest estimate was reduced 13 percent to 70,200 tons due to drought. Dry weather may also adversely affect the 1995/96 crop. Spain is the world's second largest producer of almonds, accounting for 16 percent of forecasted world output in 1994/95.

Almond prices have risen sharply in Spain. In January 1995, the average price for Spanish shelled almonds was \$3.63 per kilogram compared with \$2.46 per kilogram two years earlier, up 48 percent.

Spain's 1994/95 export forecast has been decreased 23 percent to 28,500 tons due to the smaller harvest. Spanish almond exports from September to December 1994 totaled 12,500 tons compared with 16,300 tons shipped during the same time period in 1993. Stiffening competition in world markets is the reason for lower shipments to date.

The Spanish nougat industry, which uses almonds, is the largest nougat industry in the world. This branch of the confectionery sector continues to stimulate consumption of almonds in Spain.

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**MACADAMIA NUTS: PRODUCTION, SUPPLY, AND DISTRIBUTION**  
**(Metric Tons, Inshell Basis)**  
**Marketing Years 1992/93-1994-95**

Country/ Marketing Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks	Total Distribution
<b>Australia <sup>1/</sup></b>								
1992/93	763	12,000	0	12,763	8,080	4,683	0	12,763
1993/94	0	16,000	0	16,000	8,525	7,475	0	16,000
1994/95 <sup>F</sup>	0	22,000	0	22,000	12,000	9,000	1,000	22,000
<b>Brazil <sup>2/</sup></b>								
1992/93	0	580	0	580	2	598	0	600
1993/94	0	700	0	700	0	580	0	580
1994/95 <sup>F</sup>	0	630	0	630	0	700	0	700
<b>Costa Rica <sup>3/</sup></b>								
1992/93	246	2,400	0	2,646	1,735	700	211	2,646
1993/94	211	2,750	0	2,961	1,804	800	357	2,961
1994/95 <sup>F</sup>	357	3,200	0	3,557	2,500	850	207	3,557
<b>Guatemala <sup>3/</sup></b>								
1992/93	60	1,588	181	1,829	1,769	15	45	1,829
1993/94	45	1,943	227	2,215	2,080	15	120	2,215
1994/95 <sup>F</sup>	120	2,050	250	2,420	2,285	15	120	2,420
<b>Kenya <sup>3/</sup></b>								
1992/93	584	3,299	0	3,883	3,365	77	441	3,883
1993/94	441	3,070	0	3,511	3,300	96	115	3,511
1994/95 <sup>F</sup>	115	3,600	0	3,715	3,525	110	80	3,715
<b>South Africa <sup>3/</sup></b>								
1992/93	0	1,260	0	1,260	684	576	0	1,260
1993/94	0	2,000	0	2,000	800	1,200	0	2,000
1994/95 <sup>F</sup>	0	2,200	0	2,200	1,000	1,200	0	2,200
<b>United States <sup>1/ 4/ 5/ 6/</sup></b>								
1992/93	N.A.	21,773	9,344	31,117	4,428	26,668	N.A.	31,117
1993/94	N.A.	21,999	8,120	30,119	2,839	27,400	N.A.	30,119
1994/95 <sup>F</sup>	N.A.	22,680	6,700	29,380	2,600	26,710	N.A.	29,380
<b>TOTAL</b>								
1992/93	1,653	42,900	9,525	54,078	20,063	33,317	697	54,078
1993/94	732	48,642	8,347	57,506	19,348	37,566	592	57,506
1994/95 <sup>F</sup>	592	56,360	6,950	63,902	23,910	38,585	1,407	63,902

<sup>1/</sup> Marketing year begins on July 1 of first year shown.

<sup>2/</sup> Marketing year begins on May 1 of first year shown.

<sup>3/</sup> Marketing year begins on January 1 of second year shown.

<sup>4/</sup> U.S. exports and imports come from Bureau of the Census with forecasts by USDA/ Foreign Agricultural Service (FAS).

<sup>5/</sup> U.S. exports include only prepared and preserved macadamia nuts. Few U.S. exports are shelled or unshelled.

<sup>6/</sup> U.S. production, exports, and imports were converted to inshell basis using recovery rates of 0.215, 0.231, and 0.229 for 1992/93, 1993/94, and 1994/95, respectively. U.S. exports do not include tourist purchases of prepared or preserved macadamias.

**WALNUTS: PRODUCTION, SUPPLY, AND DISTRIBUTION**  
**(Metric Tons, Inshell Basis)**  
**Marketing Years 1992/93-1994-95 <sup>1/</sup>**

Country/ Marketing Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks	Total Distribution
<b>Chile</b>								
1992/93	247	9,500	0	9,747	8,258	1,242	247	9,747
1993/94	247	10,000	0	10,247	8,665	1,435	147	10,247
1994/95 <sup>F</sup>	147	10,500	0	10,647	9,000	1,500	147	10,647
<b>China</b>								
1992/93	0	163,862	75	163,937	54,532	109,405	0	163,937
1993/94	0	192,159	85	192,244	52,000	140,244	0	192,244
1994/95 <sup>F</sup>	0	175,000	90	175,090	54,000	121,090	0	175,090
<b>France</b>								
1992/93	0	24,000	7,300	31,300	13,700	17,600	0	31,300
1993/94	0	18,900	11,150	30,050	11,850	18,200	0	30,050
1994/95 <sup>F</sup>	0	27,500	6,500	34,000	15,300	18,700	0	34,000
<b>India</b>								
1992/93	490	23,500	0	23,990	10,550	8,500	4,940	23,990
1993/94	4,940	21,000	0	25,940	15,000	8,500	2,440	25,940
1994/95 <sup>F</sup>	2,440	23,000	0	25,440	15,000	9,300	1,140	25,440
<b>Italy</b>								
1992/93	500	22,000	7,000	29,500	1,000	27,000	1,500	29,500
1993/94	1,500	16,000	12,000	29,500	1,000	28,000	500	29,500
1994/95 <sup>F</sup>	1,000	13,000	9,500	23,500	1,000	21,500	1,000	23,500
<b>Turkey</b>								
1992/93	3,500	66,000	196	69,696	1,190	65,006	3,500	69,696
1993/94	3,500	65,000	200	68,700	1,000	65,000	2,700	68,700
1994/95 <sup>F</sup>	3,500	66,000	198	69,698	1,095	65,003	3,100	69,198
<b>United States <sup>2/ 3/</sup></b>								
1992/93	61,913	187,912	10,428	260,253	81,820	137,074	41,358	260,253
1993/94	40,563	236,429	1,544	278,535	90,623	107,107	80,806	278,535
1994/95 <sup>F</sup>	79,062	205,140	370	284,572	102,000	128,183	54,388	284,572
<b>TOTAL</b>								
1992/93	66,650	496,774	24,999	588,423	171,050	365,827	51,545	588,423
1993/94	50,750	559,488	24,979	635,216	180,138	366,486	86,593	635,216
1994/95 <sup>F</sup>	86,149	520,140	16,658	622,947	197,395	365,777	59,775	622,947

<sup>1/</sup> Marketing Years: March-February for Chile; August-July for the United States; September-August for Italy and Turkey; October-September for China, France, and India.

<sup>2/</sup> U.S. export and import data come from the Bureau of the Census with forecasts by USDA/Foreign Agricultural Service.

<sup>3/</sup> U.S. production and exports were converted to inshell basis using recovery rates of 0.4078, 0.4161, and 0.4171 for 1992/93, 1993/94, and 1994/95, respectively. U.S. imports were converted to inshell basis using a constant recovery rate of 0.35.

**HAZELNUTS: PRODUCTION, SUPPLY, AND DISTRIBUTION**  
**(Metric Tons, Inshell Basis)**  
**Marketing Years 1992/93-1994-95 <sup>1/</sup>**

Country/ Marketing Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks	Total Distribution
Italy								
1992/93	30,000	90,000	26,984	146,984	39,635	77,349	30,000	146,984
1993/94	30,000	80,000	40,000	150,000	55,000	78,000	17,000	150,000
1994/95 <sup>F</sup>	17,000	130,000	30,000	177,000	75,000	78,000	24,000	177,000
Spain								
1992/93	5,000	26,400	8,600	40,000	10,900	21,100	8,000	40,000
1993/94	8,000	12,800	10,000	30,800	9,000	21,300	500	30,800
1994/95 <sup>F</sup>	500	30,400	5,000	35,900	12,000	21,400	2,500	35,900
Turkey								
1992/93	125,000	580,000	106	705,106	291,921	178,185	235,000	705,106
1993/94	235,000	300,000	12	535,012	265,357	149,655	120,000	535,012
1994/95 <sup>F</sup>	120,000	480,000	0	600,000	350,000	125,000	125,000	600,000
United States <sup>2/ 3/</sup>								
1992/93	3,524	25,129	10,212	38,865	12,085	23,497	3,283	38,865
1993/94	3,205	37,195	8,878	49,278	21,807	25,497	1,973	49,278
1994/95 <sup>F</sup>	1,993	18,144	7,600	27,737	10,000	16,603	1,134	27,737
TOTAL								
1992/93	163,524	721,529	45,902	930,955	354,541	300,131	276,283	930,955
1993/94	276,205	429,995	58,890	765,090	351,164	274,452	139,473	765,090
1994/95 <sup>F</sup>	139,493	658,544	42,600	840,637	447,000	241,003	152,634	840,637

<sup>1/</sup> Marketing Years: July-June for the United States; September -August for Spain, Italy, and Turkey.

<sup>2/</sup> U.S. imports are from the Bureau of the Census with forecasts by the USDA/Foreign Agricultural Service (FAS).

<sup>3/</sup> U.S. exports come from the Hazelnut Marketing Board with USDA/FAS forecast based on data from the Hazelnut Marketing Board.

**ALMONDS: PRODUCTION, SUPPLY, AND DISTRIBUTION**  
**(Metric Tons, Shelled Basis)**  
**Marketing Years 1992/93-1994-95 <sup>1/</sup>**

Country/ Marketing Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks	Total Distribution
<b>Greece</b>								
1992/93	1,443	16,000	1,650	19,093	2,500	15,500	1,093	19,093
1993/94	1,093	20,000	1,500	22,593	3,500	15,790	3,303	22,593
1994/95 <sup>F</sup>	3,303	18,000	1,400	22,703	3,000	16,000	3,703	22,703
<b>Italy</b>								
1992/93	6,000	18,000	6,991	30,991	4,093	22,898	4,000	30,991
1993/94	4,000	15,000	7,000	26,000	3,000	22,500	500	26,000
1994/95 <sup>F</sup>	500	19,000	10,500	30,000	4,500	22,500	3,000	30,000
<b>Morocco</b>								
1992/93	1,300	8,213	10	9,523	0	8,200	1,323	9,523
1993/94	1,323	7,113	4	8,440	130	8,000	310	8,440
1994/95 <sup>F</sup>	310	10,500	10	10,820	1,000	8,700	1,120	10,820
<b>Spain</b>								
1992/93	18,500	72,000	2,500	93,000	31,300	49,200	12,500	93,000
1993/94	12,500	75,200	4,900	92,600	37,100	49,300	6,200	92,600
1994/95 <sup>F</sup>	6,200	70,200	6,000	82,400	28,500	49,500	4,400	82,400
<b>Turkey</b>								
1992/93	3,300	15,700	251	19,251	294	15,957	3,000	19,251
1993/94	3,000	16,000	250	19,250	400	15,850	3,000	19,250
1994/95 <sup>F</sup>	3,000	16,000	250	19,250	400	15,850	3,000	19,250
<b>United States <sup>2/ 3/</sup></b>								
1992/93	67,178	248,571	116	315,865	158,690	97,703	59,472	315,865
1993/94	59,472	222,263	150	281,885	152,648	82,684	46,553	281,885
1994/95 <sup>F</sup>	51,539	299,374	190	351,003	188,000	81,456	81,647	351,103
<b>TOTAL</b>								
1992/93	97,721	378,484	11,518	487,723	196,877	209,458	81,388	487,723
1993/94	81,388	355,576	13,804	450,768	196,778	194,124	59,866	450,768
1994/95 <sup>F</sup>	64,852	433,074	18,350	516,276	225,400	191,006	96,870	516,276

<sup>1/</sup> Marketing Years: July-June for the United States, Morocco; August-July for Tunisia; September-August for Spain, Italy, Turkey; October-September for Greece.

<sup>2/</sup> U.S. import data are from Bureau of the Census.

<sup>3/</sup> U.S. export and stock data for 1992/93 and 1993/94 come from the Almond Board of California; 1994/95 export and import forecast by USDA/ Foreign Agricultural Service based on Bureau of the Census data.

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION  
MARKETING YEAR BEGINNING AS INDICATED  
FEB 95

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
MEXICO		20,177	8,953	69,556	47,055	152,059	11,450	4,885	39,457	27,283	86,274
TAIWAN		8,861	5,929	81,101	92,994	99,053	6,660	3,899	64,032	72,514	75,244
CANADA		7,171	6,520	52,016	54,379	80,913	5,503	5,380	39,042	38,910	59,914
HONG KONG		4,502	4,416	38,765	43,893	61,585	2,464	2,445	22,196	24,761	33,749
EU 15		3,020	4,961	25,320	38,679	36,288	1,732	2,850	11,945	18,266	18,074
THAILAND		902	2,943	22,470	25,531	31,005	503	2,008	16,167	16,495	21,277
OTHER		7,931	16,061	115,161	198,345	147,673	4,698	10,293	60,604	105,607	78,842
Subtotal:-----		52,565	49,783	404,390	500,876	608,577	33,009	31,759	253,444	303,835	373,374
FR. PEARS(JUL)	MT										
MEXICO		5,765	3,936	31,286	39,573	53,629	2,717	1,961	15,935	18,255	26,653
CANADA		2,279	3,365	30,600	37,495	39,645	1,520	2,168	20,392	22,235	26,222
EU 15		214	780	11,604	8,999	11,674	158	367	5,203	3,545	5,262
TAIWAN		807	402	3,565	5,125	8,059	468	237	2,159	3,090	4,834
OTHER		637	992	14,576	25,126	15,326	323	604	8,079	13,152	8,482
Subtotal:-----		9,704	9,475	91,630	116,318	128,332	5,187	5,338	51,768	60,278	71,452
APRICOTS(MAY)	MT										
CANADA		8	4	3,030	3,139	3,030	11	6	4,043	3,293	4,043
MEXICO		0	0	1,515	3,718	1,515	0	0	1,183	2,596	1,183
EU 15		7	13	317	222	317	6	6	955	615	955
OTHER		17	37	322	772	354	13	23	467	1,309	487
Subtotal:-----		32	54	5,184	7,850	5,216	31	34	6,647	7,814	6,667
FR. CHERRIES(MAY)	MT										
JAPAN		0	2	12,467	15,578	12,467	0	12	77,333	92,557	77,333
CANADA		0	40	6,235	6,356	6,235	0	37	13,376	15,319	13,376
EU 15		1	94	2,173	4,231	2,213	5	73	7,764	11,187	7,926
TAIWAN		0	0	2,140	3,004	2,140	0	0	4,705	8,133	4,705
HONG KONG		14	0	1,847	1,377	1,847	32	0	5,550	3,668	5,550
OTHER		0	1	510	536	522	0	9	1,761	2,120	1,806
Subtotal:-----		16	137	25,372	31,082	25,424	37	130	110,489	130,983	110,696
PEACH-NECTRN(MAY)	MT										
CANADA		687	480	48,049	48,237	48,374	670	544	44,740	40,249	45,185
MEXICO		0	0	6,190	16,203	6,214	0	0	3,361	6,851	3,374
TAIWAN		0	0	4,194	12,446	4,207	0	0	4,269	13,511	4,276
OTHER		23	40	4,430	7,144	4,472	29	24	3,877	5,439	3,910
Subtotal:-----		710	520	62,864	84,030	63,265	699	568	56,248	66,049	56,746
PLUM-PRUNES(MAY)	MT										
CANADA		314	175	22,998	24,302	23,302	345	249	22,993	18,887	23,412
TAIWAN		0	0	13,733	25,396	13,733	0	0	12,198	22,161	12,198
HONG KONG		0	11	7,995	8,863	7,995	0	23	6,825	7,323	6,825
MEXICO		0	0	3,003	3,552	3,003	0	0	1,924	2,112	1,924
OTHER		0	123	6,641	8,717	6,660	0	261	5,855	7,492	5,875
Subtotal:-----		314	308	54,369	70,830	54,692	345	533	49,795	57,974	50,234
FR. AVOCADOS(OCT)	MT										
EU 15		156	1,827	991	4,550	4,698	127	1,518	876	3,654	4,440
FRANCE		51	1,378	409	2,804	2,156	46	1,172	333	2,318	1,944
CANADA		91	68	748	864	2,054	101	73	873	721	2,728
JAPAN		148	16	624	215	1,995	153	20	565	308	3,905
NETHERLANDS		36	160	211	895	1,278	28	123	239	684	1,302
UNITED KINGDOM		51	212	313	661	865	40	174	277	525	871
OTHER		10	19	38	25	176	35	22	75	40	265
Subtotal:-----		405	1,931	2,402	5,655	8,923	417	1,632	2,389	4,724	11,338
FR. KIWI FRUIT(OCT)	MT										
CANADA		518	280	2,142	2,224	3,730	616	378	2,563	2,641	4,605
TAIWAN		300	167	836	260	1,990	513	244	1,462	2,415	3,556
KOREA, REPUBLIC		361	632	980	1,430	1,729	656	1,042	1,802	2,468	3,120
MEXICO		169	71	362	332	502	146	60	349	2,222	4,494
OTHER		200	179	611	850	799	315	240	952	1,194	1,315
Subtotal:-----		1,548	1,328	4,931	5,094	8,749	2,246	1,964	7,128	6,939	13,091
FRESH GRAPES (MAY)	MT										
CANADA		656	477	108,849	99,940	111,233	891	750	119,762	109,877	123,408
HONG KONG		0	29	18,018	21,146	18,018	0	35	20,938	25,273	20,938
TAIWAN		40	69	13,310	14,697	13,330	35	56	17,218	20,857	17,239
MEXICO		116	74	9,736	22,589	10,757	96	0	9,279	19,218	9,922
OTHER		436	74	53,035	54,661	53,162	466	103	67,454	73,958	67,575
Subtotal:-----		1,248	649	202,947	213,034	206,500	1,487	944	234,650	249,182	239,081
FR. STRAWBERRIES(JAN)	MT										
CANADA		1,385	1,071	2,376	1,525	38,873	2,684	2,131	4,689	3,276	52,089
MEXICO		156	0	166	10	6,816	34	0	42	6	6,245
EU 15		123	38	274	89	5,738	288	120	698	263	11,850
JAPAN		0	0	0	5	4,338	0	0	0	10	21,177
UNITED KINGDOM		51	11	72	34	3,700	118	33	181	93	7,394
OTHER		79	146	151	214	1,570	302	367	579	551	5,003
Subtotal:-----		1,743	1,255	2,966	1,844	57,335	3,308	2,619	6,007	4,106	96,365
FR. ORNG INC TMPL(NOV)	MT										
CANADA		24,402	21,961	81,242	79,475	188,551	11,560	9,732	41,880	37,928	93,157
JAPAN		13,167	25,212	35,291	48,671	158,170	6,993	16,238	20,666	33,040	94,865
HONG KONG		6,551	9,424	27,000	32,785	124,417	3,212	4,953	14,433	16,466	62,213
OTHER		6,662	12,920	16,549	26,089	76,902	3,576	6,821	9,236	14,483	39,918
Subtotal:-----		50,783	69,518	160,083	187,020	548,041	25,341	37,744	86,215	101,918	290,154
FR. GRPFRT(SEP)	MT										
JAPAN		41,527	47,963	104,549	124,470	250,229	21,406	25,114	57,207	69,182	130,749
EU 15		15,420	16,082	73,337	89,243	102,114	8,138	6,855	36,045	39,428	50,415
CANADA		7,969	8,989	43,851	46,282	74,378	2,906	3,245	18,860	17,796	30,483
FRANCE		5,959	4,192	26,870	31,234	39,454	3,161	1,818	14,269	13,671	20,546
NETHERLANDS		3,912	7,588	19,880	28,842	26,469	1,964	3,128	9,397	13,077	12,834
OTHER		5,402	4,017	11,341	17,840	31,988	2,533	1,717	5,779	9,162	15,431
Subtotal:-----		70,318	77,051	233,078	277,835	458,709	34,983	36,931	117,891	135,568	227,078
FR. TANGERINES(NOV)	MT										
CANADA		1,893	1,428	7,466	7,875	11,320	1,361	1,359	5,862	7,114	9,003
EU 15		205	277	417	277	967	121	214	235	214	512
UNITED KINGDOM		127	246	151	246	701	83	193	105	193	382
OTHER		108	315	204	1,162	514	173	394	233	1,103	497
Subtotal:-----		2,206	2,020	8,088	9,314	12,801	1,654	1,968	6,330	8,431	10,012

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION  
MARKETING YEAR BEGINNING AS INDICATED  
FEB 95

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
<b>CANNED FRUIT</b>											
CND PEACH&NECT(JUN)	MT										
JAPAN		438	305	3,582	2,666	5,674	571	307	4,113	2,933	6,363
CANADA		366	317	2,150	2,536	2,809	425	258	2,516	2,517	3,285
HONG KONG		54	28	1,264	643	1,768	46	28	1,161	611	1,515
TAIWAN		179	149	1,342	1,125	1,719	143	111	1,164	932	1,493
MEXICO		5	0	1,308	331	1,400	5	0	982	248	1,061
SINGAPORE		87	48	1,133	739	1,194	91	48	1,161	830	1,222
OTHER		296	693	3,611	4,700	4,744	243	651	2,932	4,072	3,866
Subtotal:-----		1,425	1,539	14,389	12,741	19,309	1,523	1,403	14,028	12,144	18,804
<b>CND PEARS(JUN)</b>											
CANADA	MT	154	196	1,097	1,691	1,554	154	174	1,119	1,605	1,595
JAPAN		125	41	330	277	402	144	73	371	315	425
MEXICO		0	0	148	18	164	0	0	139	17	144
OTHER		107	135	629	1,131	770	95	142	533	861	666
Subtotal:-----		385	372	2,205	3,116	2,890	394	390	2,162	2,798	2,830
<b>CND PNEAPL(JAN)</b>											
JAPAN	MT	31	32	101	32	985	31	29	127	29	929
CANADA		133	71	133	109	947	121	64	121	107	887
EU 15		85	103	85	103	756	72	81	72	81	654
MEXICO		24	0	30	3	522	18	0	23	3	361
GERMANY		85	103	85	103	420	72	81	72	81	335
RUSSIAN FEDERATI		0	0	0	0	302	0	0	0	0	204
OTHER		5	33	24	89	268	7	37	28	78	257
Subtotal:-----		278	238	372	336	3,779	249	211	371	298	3,292
<b>FRT MIXTURES(JUN)</b>											
JAPAN	MT	485	236	4,565	4,071	6,205	694	261	5,539	4,752	7,448
CANADA		308	321	4,561	3,452	5,677	410	392	5,714	4,183	7,055
HONG KONG		224	480	2,996	3,141	3,999	255	529	3,160	3,488	4,205
SINGAPORE		91	151	1,989	3,963	2,575	102	175	2,187	4,336	2,836
OTHER		897	773	7,564	7,341	9,517	1,087	903	9,171	8,385	11,359
Subtotal:-----		2,006	1,962	21,674	21,968	27,974	2,547	2,261	25,772	25,145	32,904
<b>DRIED FRUIT</b>											
<b>DRD RAISINS(AUG)</b>											
EU 15	MT	3,882	4,319	37,834	35,261	58,981	6,207	6,867	57,821	56,299	91,498
UNITED KINGDOM		1,796	2,431	15,715	16,315	26,123	3,000	3,890	24,310	24,707	40,217
JAPAN		1,695	2,350	14,586	13,913	25,338	2,458	3,674	21,686	20,170	37,283
GERMANY		775	532	8,294	4,468	12,132	1,003	770	10,965	6,674	16,772
CANADA		718	776	7,001	6,999	11,595	1,514	1,533	14,925	14,261	24,081
OTHER		2,350	2,106	18,283	18,462	29,191	3,535	3,599	28,091	31,033	45,919
Subtotal:-----		8,646	9,550	77,704	74,634	125,105	13,714	15,673	122,523	121,763	198,782
<b>DRD PRUNES(AUG)</b>											
EU 15	MT	2,738	2,851	22,062	21,185	32,679	7,003	6,854	49,921	51,751	77,852
JAPAN		548	1,558	8,429	7,945	14,216	1,256	2,884	18,456	17,441	32,752
GERMANY		1,306	808	6,818	6,110	10,952	3,104	2,015	15,029	14,275	25,806
ITALY		319	533	4,268	3,910	6,245	878	1,304	11,128	10,320	16,900
CANADA		322	425	2,862	2,658	4,683	790	1,022	6,626	6,208	11,106
NETHERLANDS		508	250	2,425	1,700	3,798	1,539	694	6,459	4,526	10,261
OTHER		631	671	5,890	5,618	8,925	1,343	1,469	11,601	11,917	18,240
Subtotal:-----		4,239	5,504	39,242	37,406	60,503	10,392	12,229	86,603	87,318	139,950
<b>FRUIT JUICES(SSE)</b>											
<b>ORANGE JU CNC (DEC)</b>											
EU 15	KL	4,360	12,816	15,950	36,779	91,091	1,755	11,539	7,036	19,269	36,218
JAPAN		2,510	1,754	6,271	3,733	69,389	1,718	1,116	4,598	2,308	28,196
FRANCE		2,498	4,438	10,379	15,837	38,676	918	1,588	4,212	4,749	14,007
CANADA		2,176	2,506	7,216	8,039	33,030	3,537	4,314	11,636	12,875	50,778
KOREA, REPUBLIC		2,724	2,493	4,787	3,531	24,619	1,493	1,277	3,809	2,094	15,559
NETHERLANDS		61	6,558	414	13,600	21,706	19	9,183	227	11,819	8,913
OTHER		2,296	6,448	11,332	19,187	46,673	991	3,215	4,477	8,269	19,103
Subtotal:-----		14,067	26,017	45,556	71,270	264,801	9,495	21,461	31,556	44,816	149,855
<b>ORNG JU NTCNC(DEC)</b>											
CANADA	KL	5,382	7,162	15,710	19,753	65,910	3,563	5,291	10,579	14,024	43,797
EU 15		878	7,478	6,605	20,966	52,654	562	4,321	3,990	12,180	32,983
BELGIUM-LUXEMBOU		0	4,680	981	14,368	30,665	0	2,816	611	8,064	18,995
UNITED KINGDOM		372	2,585	2,422	5,684	13,138	215	1,373	1,401	3,446	7,492
OTHER		1,252	1,231	3,563	4,576	21,381	932	1,199	2,807	3,684	16,115
Subtotal:-----		7,512	15,871	25,878	45,296	139,946	5,057	10,811	17,376	29,888	92,895
<b>GRPFRT JU CNC (DEC)</b>											
JAPAN	KL	1,159	2,182	1,960	3,344	17,232	1,868	2,190	2,904	3,275	21,264
EU 15		593	2,522	1,997	3,994	15,814	230	1,159	922	2,130	7,476
FRANCE		95	186	671	886	6,701	35	134	283	525	1,922
NETHERLANDS		280	312	308	564	3,860	90	322	135	626	2,806
CANADA		129	148	337	681	3,085	220	259	559	1,201	5,140
OTHER		445	1,084	736	5,425	5,012	141	529	349	1,848	2,503
Subtotal:-----		2,327	5,936	5,030	13,444	41,143	2,459	4,137	4,733	8,454	36,383
<b>FRESH VEGETABLES</b>											
<b>FR ASPARAGUS(OCT)</b>											
JAPAN	MT	1,166	1,788	1,922	2,846	10,284	5,372	7,723	8,765	12,478	40,777
CANADA		250	589	760	1,045	7,315	813	1,448	2,349	2,859	17,193
SWITZERLAND		296	231	358	293	2,363	1,142	884	1,332	1,088	7,628
EU 15		163	162	211	284	1,672	594	547	782	873	4,495
OTHER		9	4	13	41	347	26	16	45	118	1,455
Subtotal:-----		1,883	2,774	3,264	4,509	21,980	7,949	10,618	13,272	17,415	71,547
<b>FR ONIONS(OCT)</b>											
CANADA	MT	4,298	7,435	33,789	38,659	102,144	2,644	3,475	16,788	16,924	39,439
JAPAN		7	12,882	1,844	119,297	37,191	31	4,537	480	34,633	10,682
MEXICO		68	48	8,914	14,420	18,310	27	44	2,680	4,199	5,250
KOREA, REPUBLIC		0	0	38	11,959	13,366	0	0	19	3,577	4,909
OTHER		288	846	6,241	12,574	22,817	196	359	2,896	4,440	9,478
Subtotal:-----		4,661	21,210	50,826	196,909	193,829	2,898	8,414	22,863	63,773	69,758
<b>CANNED VEGETABLES</b>											
<b>CND SWT CORN(AUG)</b>											
JAPAN	MT	3,606	6,113	36,399	33,335	59,668	2,924	5,170	28,962	28,756	48,168
EU 15		3,984	2,486	30,415	19,413	39,467	2,674	1,948	21,980	14,683	28,525
TAIWAN		1,583	872	9,073	10,622	15,911	1,546	771	8,077	10,092	14,379
HONG KONG		1,086	549	8,446	6,531	13,803	884	491	6,510	5,582	10,733
UNITED KINGDOM		1,627	455	7,571	5,864	11,526	1,113	388	5,282	4,403	8,145
NETHERLANDS		1,678	80	10,191	1,848	11,266	1,003	55	7,266	1,184	7,928
OTHER		1,915	2,533	14,983	21,469	25,628	1,412	2,199	12,241	18,463	21,565
Subtotal:-----		12,174	12,554	99,315	91,371	154,477	9,440	10,578	77,771	77,577	123,369

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION  
MARKETING YEAR BEGINNING AS INDICATED  
FEB 95

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
<b>CANNED VEGETABLES</b>											
CND TOM PAS(JUL)	MT										
CANADA		2,222	3,386	28,764	34,879	43,168	1,983	2,903	24,855	28,166	37,437
JAPAN		924	791	5,859	6,950	8,247	540	705	4,957	5,425	6,858
AUSTRALIA		0	0	6,275	117	6,332	0	0	4,856	93	4,893
KOREA, REPUBLIC		493	256	3,489	1,440	4,800	413	270	3,233	1,349	4,343
OTHER		883	5,806	11,217	21,340	15,267	754	4,647	8,479	17,348	11,682
Subtotal:-----		4,523	10,239	55,603	64,726	77,814	3,691	8,525	46,380	52,382	65,213
CND TOM SAUCE(JUL)	MT										
CANADA		3,798	4,185	31,264	30,506	51,739	3,969	4,286	31,913	29,816	51,151
EU 15		328	1,528	3,630	6,897	7,209	555	1,196	4,366	6,729	7,955
MEXICO		560	118	3,767	4,846	6,060	384	90	2,477	3,236	3,953
JAPAN		352	337	3,537	3,851	5,201	455	342	3,802	4,286	6,127
UNITED KINGDOM		237	1,277	2,410	4,839	4,764	379	934	2,660	4,498	4,723
OTHER		523	880	5,232	6,273	10,504	558	787	5,341	6,424	10,037
Subtotal:-----		5,561	7,048	47,430	52,373	80,713	5,922	6,700	47,899	50,491	79,222
<b>FRZN VEGETABLES</b>											
FZN SWT CORN(JUL)	MT										
JAPAN		2,417	3,012	27,519	26,125	39,969	2,191	2,843	24,444	24,868	36,158
AUSTRALIA		369	196	4,380	2,794	5,189	310	197	3,285	2,317	3,921
HONG KONG		217	245	3,097	2,366	4,235	193	198	2,304	2,105	3,345
CANADA		381	545	1,772	2,522	3,124	324	464	1,410	2,002	2,543
OTHER		650	1,795	6,440	13,905	9,873	547	918	5,401	10,267	8,317
Subtotal:-----		4,036	5,793	43,209	47,712	62,389	3,565	4,620	36,844	41,558	54,283
FZN F FRY(JUL)	MT										
JAPAN		11,345	16,234	86,370	103,446	134,450	8,237	12,267	60,810	75,036	95,428
KOREA, REPUBLIC		1,404	1,879	10,636	11,708	17,784	1,012	1,404	7,040	8,420	11,869
HONG KONG		614	1,706	7,702	9,560	12,812	408	1,048	4,973	6,360	8,402
OTHER		5,413	11,301	49,195	73,091	75,482	4,194	9,096	36,171	57,327	56,337
Subtotal:-----		18,776	31,120	153,904	197,805	240,529	13,851	23,814	108,994	147,143	172,036
<b>TREE NUTS</b>											
ALMONDS UNSH(JUL)	MT										
JAPAN		648	393	4,081	2,231	6,276	1,575	1,143	9,849	6,667	15,711
INDIA		224	528	3,319	6,431	4,259	823	1,305	9,583	16,351	12,553
EU 15		0	252	701	2,604	867	0	674	1,425	6,297	1,759
OTHER		2	72	1,475	2,860	2,043	13	212	3,488	6,861	4,803
Subtotal:-----		874	1,245	9,576	14,127	13,445	2,411	3,335	24,344	36,177	34,827
ALMND SH/PRP(JUL)	MT										
EU 15		7,234	17,973	66,383	94,785	97,407	35,103	59,912	289,804	327,674	431,545
GERMANY		2,799	8,052	29,417	38,439	39,872	12,645	26,724	125,617	132,560	169,362
JAPAN		989	2,032	14,535	11,377	18,588	5,638	7,281	73,287	44,506	96,366
UNITED KINGDOM		898	1,076	8,271	7,950	11,946	4,520	4,051	33,791	28,018	50,821
NETHERLANDS		835	1,011	7,353	9,292	11,169	4,048	3,458	33,959	31,529	52,747
FRANCE		893	2,045	7,005	10,106	10,868	4,523	6,672	31,896	34,114	51,248
OTHER		2,560	4,874	33,406	44,188	46,653	11,079	14,422	137,487	138,955	189,227
Subtotal:-----		10,784	24,879	114,324	150,349	162,648	51,820	81,615	500,578	511,135	717,138
WALNUTS SH(AUG)	MT										
EU 15		141	302	6,538	6,919	7,709	495	823	13,984	14,264	16,845
JAPAN		264	566	3,021	2,813	4,911	1,311	2,029	16,299	10,967	26,606
ITALY		0	114	2,046	3,537	2,252	0	290	3,736	5,849	4,117
CANADA		64	156	1,280	1,629	2,120	253	564	4,108	4,986	6,996
FRANCE		10	0	1,417	470	1,417	39	0	2,616	1,026	2,616
ISRAEL		180	304	967	1,175	1,399	850	1,135	4,406	3,922	6,259
OTHER		296	368	2,053	3,206	3,200	1,376	1,295	8,799	9,350	13,316
Subtotal:-----		946	1,696	13,859	15,741	19,339	4,285	5,846	47,596	43,488	70,023
WALNUTS UNSH(AUG)	MT										
EU 15		688	540	35,811	43,440	37,212	1,197	1,007	68,269	68,898	70,728
SPAIN		216	20	9,515	10,131	9,746	351	63	18,020	16,138	18,400
NETHERLANDS		20	129	8,517	5,775	8,600	34	214	16,295	9,606	16,459
GERMANY		130	20	8,071	13,013	8,593	236	32	15,287	19,302	16,217
ITALY		245	115	5,562	9,078	5,908	442	203	10,790	14,954	11,358
OTHER		196	641	6,039	8,252	7,024	443	1,193	12,795	14,778	14,569
Subtotal:-----		884	1,181	41,850	51,691	44,236	1,640	2,200	81,064	83,677	85,296
<b>HOPS&amp;PRODUCTS</b>											
HOP PELTS(SEP)	MT										
CANADA		65	43	511	506	1,267	473	289	3,461	3,382	8,310
BRAZIL		197	52	497	1,755	1,219	963	230	2,443	9,293	5,852
EU 15		13	95	359	723	504	95	438	2,386	4,591	2,988
MEXICO		0	0	0	0	363	0	0	0	0	2,593
JAPAN		0	39	256	398	256	0	205	1,383	2,593	1,385
UNITED KINGDOM		0	39	218	253	221	0	176	1,497	1,304	1,518
OTHER		256	29	400	696	616	888	177	1,616	3,944	2,431
Subtotal:-----		531	257	2,022	4,077	4,224	2,419	1,340	11,289	23,803	23,559
HOP EXTRACT(SEP)	MT										
MEXICO		416	40	1,364	338	2,246	2,536	1,217	9,558	9,646	15,676
EU 15		113	146	695	911	1,297	1,391	2,512	11,046	14,102	19,026
BRAZIL		22	38	265	236	533	290	971	2,920	3,293	4,742
GERMANY		16	77	266	461	459	342	1,336	3,494	7,184	6,085
NETHERLANDS		33	19	130	102	330	296	442	3,686	2,632	5,995
OTHER		167	377	700	966	1,385	2,946	5,240	14,437	14,741	23,698
Subtotal:-----		718	602	3,024	2,450	5,460	7,162	9,939	37,960	41,783	63,141
HOPS, NSPF(SEP)	MT										
EU 15		66	234	785	1,478	1,106	239	1,726	3,638	9,246	4,874
GERMANY		61	218	510	1,082	829	209	1,437	2,060	6,642	3,291
UNITED KINGDOM		5	1	268	378	269	30	5	1,468	2,306	1,472
JAPAN		63	37	160	90	233	370	268	958	627	1,424
MEXICO		0	0	1	0	132	0	0	9	0	598
BRAZIL		62	4	62	132	111	316	36	316	773	635
OTHER		14	28	139	253	419	430	234	1,861	1,552	4,026
Subtotal:-----		205	302	1,147	1,953	2,000	1,355	2,264	6,781	12,198	11,557
<b>WINE</b>											
GRAPE WINE(JAN)	KL										
EU 15		1,474	2,970	4,083	5,086	42,518	2,793	5,297	7,151	8,951	66,365
CANADA		2,081	2,281	4,125	3,973	32,725	2,699	4,337	5,464	6,653	49,168
UNITED KINGDOM		431	1,615	1,349	2,834	19,825	1,040	3,074	2,888	5,341	37,484
JAPAN		942	1,636	1,678	2,464	14,420	1,404	2,668	2,617	3,984	21,439
SWEDEN		158	73	746	126	6,841	188	117	739	182	4,335
OTHER		2,507	2,975	4,133	5,570	28,217	3,790	3,675	6,317	7,569	40,531
Subtotal:-----		7,004	9,862	14,019	17,092	117,880	10,686	15,977	21,549	27,157	177,503

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN  
MARKETING YEAR BEGINNING AS INDICATED  
FEB 95

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		0	0	2,296	4,478	28,387	0	0	2,674	6,293	31,041
SOUTH AFRICA, RE		0	0	3,781	5,508	19,044	0	0	2,956	4,544	16,039
CANADA		2,748	2,923	24,574	33,290	29,886	1,433	1,508	10,735	12,383	13,666
OTHER		325	968	7,072	1,179	33,758	185	368	3,318	501	13,616
Subtotal:-----		3,073	3,891	37,722	44,455	111,075	1,617	1,876	19,683	23,722	74,362
FR PEARS(JUL)	MT										
CHILE		15,056	5,549	16,280	6,214	44,495	5,133	1,949	5,524	2,183	16,093
ARGENTINA		3,042	2,817	3,042	2,817	13,831	1,802	1,580	1,802	1,580	7,587
OTHER		41	259	1,879	1,303	7,183	140	353	5,035	3,640	9,888
Subtotal:-----		18,139	8,625	21,201	10,333	65,509	7,074	3,882	12,362	7,402	33,569
APRICOT (MAY)	MT										
CHILE		0	0	781	919	781	0	0	489	651	489
NEW ZEALAND		58	166	157	242	157	113	402	283	553	283
TURKEY		1	0	20	53	56	1	0	51	66	159
OTHER		0	0	47	2	47	1	0	60	3	62
Subtotal:-----		59	166	1,005	1,216	1,042	116	402	883	1,273	993
PEACH-NEC(MAY)	MT										
CHILE		12,643	14,720	38,281	41,385	42,893	8,439	9,272	24,617	26,463	27,605
OTHER		13	5	226	192	252	25	9	208	164	240
Subtotal:-----		12,656	14,725	38,507	41,577	43,145	8,465	9,281	24,825	26,627	27,844
PLUM-PRUNE(MAY)	MT										
CHILE		6,927	7,838	14,795	14,932	21,389	4,722	5,134	9,832	9,912	14,143
OTHER		1	36	99	290	233	2	117	102	418	215
Subtotal:-----		6,928	7,874	14,893	15,222	21,621	4,724	5,251	9,934	10,330	14,358
FRESH GRAPES (MAY)	MT										
CHILE		64,817	74,508	136,482	157,732	265,879	47,292	54,737	107,169	126,043	201,749
MEXICO		0	0	41,305	41,048	41,331	0	0	55,211	46,576	55,237
OTHER		360	994	969	2,283	1,566	240	3,453	671	4,464	1,482
Subtotal:-----		65,177	75,502	178,755	201,063	308,775	47,532	58,190	163,050	177,084	258,468
FR RASPBRY(JAN)	MT										
CANADA		0	19	0	19	6,176	0	46	0	46	13,062
OTHER		223	362	292	543	1,253	352	1,042	481	1,699	2,881
Subtotal:-----		223	381	292	562	7,429	352	1,088	481	1,745	15,943
FR STRAWBRIS(JAN)	MT										
MEXICO		1,529	2,706	3,052	4,364	18,950	3,857	6,779	7,546	10,329	31,945
OTHER		27	18	91	75	893	44	29	195	163	2,360
Subtotal:-----		1,556	2,724	3,143	4,439	19,843	3,901	6,809	7,742	10,491	34,305
FR BANANA(JAN)	MT										
COSTA RICA		46,205	51,706	114,148	118,200	977,101	13,064	15,982	32,042	35,941	247,820
ECUADOR		73,007	94,851	135,253	206,142	785,910	18,895	26,154	34,658	56,055	204,154
COLOMBIA		44,326	39,016	95,888	83,218	629,509	12,837	10,720	27,872	23,273	186,765
OTHER		88,811	87,162	192,150	180,207	1,301,463	21,024	25,033	45,763	50,004	357,419
Subtotal:-----		252,348	272,735	537,439	587,767	3,693,983	65,821	77,889	140,336	165,274	996,158
FR MANGO(JAN)	MT										
MEXICO		817	1,515	817	1,561	108,432	787	1,306	787	1,329	81,678
OTHER		741	448	2,297	3,771	15,163	824	460	2,672	3,620	15,151
Subtotal:-----		1,558	1,962	3,114	5,331	123,596	1,611	1,766	3,458	4,949	96,829
FR PINAPLE(JAN)	MT										
COSTA RICA		4,782	6,395	10,495	13,095	82,295	1,911	2,335	4,314	4,733	28,637
HONDURAS		2,809	2,566	5,504	5,370	28,782	773	1,053	1,514	1,824	7,927
OTHER		808	349	1,417	951	16,784	258	99	449	358	3,523
Subtotal:-----		8,399	9,310	17,416	19,416	127,861	2,942	3,487	6,277	6,915	40,086
FR CANTLPE(MAY)	MT										
COSTA RICA		8,715	13,486	18,793	21,469	43,061	3,725	5,975	8,547	9,250	18,971
MEXICO		3,402	7,522	34,461	46,213	63,603	623	1,830	10,346	13,563	17,851
HONDURAS		12,080	11,400	35,440	32,609	64,399	2,700	2,603	8,232	7,409	14,716
GUATEMALA		183	551	22,598	25,010	36,328	113	86	7,013	7,645	11,415
OTHER		2,828	3,733	10,760	10,836	19,831	642	862	2,550	2,502	4,630
Subtotal:-----		27,209	36,692	122,053	136,136	227,221	7,804	11,357	36,688	40,370	67,583
FR MELON,OT(MAY)	MT										
MEXICO		2,259	2,492	32,926	33,355	40,290	840	773	11,710	10,921	14,546
COSTA RICA		5,550	4,386	7,427	6,356	29,573	2,273	2,013	3,055	2,856	11,703
OTHER		6,044	7,442	29,113	29,711	44,425	1,959	2,425	9,957	9,595	14,557
Subtotal:-----		13,852	14,320	69,466	69,422	114,288	5,072	5,212	24,722	23,373	40,806
FR ORANGES( NOV)	MT										
AUSTRALIA		0	0	0	0	9,382	0	0	2	0	10,635
OTHER		673	1,217	2,379	3,037	6,849	362	592	1,175	1,524	2,592
Subtotal:-----		673	1,217	2,379	3,037	16,234	362	592	1,180	1,526	13,245
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EU 15		3,238	3,718	4,853	5,607	29,717	2,459	3,667	3,734	5,492	23,341
SPAIN		3,105	3,717	4,720	5,606	29,580	2,337	3,665	3,612	5,492	23,213
CHINA, PEOPLES R		704	1,202	1,840	1,355	19,914	508	981	1,355	1,689	14,697
OTHER		45	15	75	40	948	48	21	71	49	828
Subtotal:-----		3,988	4,935	6,768	7,842	50,578	3,015	4,670	5,160	7,231	38,866
CND BLK OLV( NOV)	MT										
EU 15		1,156	1,042	4,771	3,384	12,078	2,188	2,309	8,848	7,596	23,739
SPAIN		977	895	3,983	2,538	9,944	1,799	1,998	7,043	5,562	18,786
MOROCCO		61	570	711	1,584	2,820	111	1,089	1,223	3,012	5,022
OTHER		14	0	61	23	113	23	0	115	58	207
Subtotal:-----		1,230	1,612	5,542	4,990	15,011	2,322	3,397	10,187	10,665	28,968
CND GRN OLV( NOV)	MT										
EU 15		1,843	2,385	11,755	11,084	39,796	4,855	7,134	29,545	31,793	104,310
SPAIN		1,761	2,384	11,449	10,786	39,081	4,710	7,130	29,012	31,212	102,782
OTHER		125	208	665	721	2,530	137	326	960	1,073	3,806
Subtotal:-----		1,968	2,593	12,420	11,805	42,340	4,992	7,460	30,505	32,866	108,155
CND PEACH(JUN)	MT										
EU 15		584	1,125	12,944	13,504	16,731	356	686	7,470	7,573	9,614
GREECE		436	1,120	11,812	13,232	15,515	266	674	6,757	7,302	8,832
OTHER		303	48	3,983	2,845	4,479	164	28	2,044	1,845	2,310
Subtotal:-----		888	1,172	16,927	16,349	21,211	521	715	9,515	9,418	11,925
CND PINAPLE(JAN)	MT										
THAILAND		15,757	7,572	29,716	19,945	154,150	8,125	4,017	15,370	10,540	78,883
PHILIPPINES		10,115	12,640	26,005	23,262	129,101	6,731	6,503	17,696	11,891	74,096
OTHER		3,857	5,526	7,027	10,761	50,388	1,275	2,071	2,677	3,995	20,440
Subtotal:-----		29,729	25,737	62,747	53,968	333,639	16,131	12,592	35,744	26,426	173,419

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN  
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FEB 95

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		897	1,038	6,067	9,774	8,765	2,510	1,701	15,399	15,188	22,058
OTHER		33	19	372	131	556	61	30	876	316	1,434
Subtotal:-----		930	1,058	6,439	9,906	9,321	2,571	1,731	16,275	15,504	23,491
DATES(SEP)	MT										
PAKISTAN		451	334	1,467	1,165	4,346	493	331	1,598	1,135	4,288
OTHER		59	132	524	557	984	65	193	928	996	1,546
Subtotal:-----		510	466	1,991	1,722	5,330	557	525	2,526	2,131	5,835
DRD FIG(SEP)	MT										
TURKEY		88	232	758	898	1,329	108	253	1,231	1,346	1,854
EU 15		0	22	761	1,115	761	0	27	1,820	2,710	1,820
GREECE		0	22	727	1,069	727	0	27	1,695	2,571	1,695
MEXICO		0	0	1,186	250	1,376	0	0	518	857	1,203
OTHER		0	0	23	26	78	0	0	58	63	98
Subtotal:-----		88	254	2,728	2,289	3,545	108	281	3,627	4,976	4,975
DRD RAISIN(AUG)	MT										
MEXICO		129	297	3,413	3,384	3,413	142	219	3,151	2,951	3,151
TURKEY		164	115	1,650	1,254	2,151	179	118	1,665	1,213	2,187
CHILE		0	60	507	1,199	1,015	0	42	618	1,437	1,271
OTHER		38	0	223	178	376	47	0	273	200	403
Subtotal:-----		330	472	5,793	6,014	6,955	368	379	5,707	5,801	7,012
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
EU 15		33,330	34,905	167,652	182,237	301,622	6,136	10,034	35,826	44,497	63,142
ARGENTINA		1,058	2,186	192,401	175,968	329,391	182	436	36,357	27,278	56,887
GERMANY		23,932	29,278	113,056	131,002	206,824	4,527	8,673	24,551	32,679	44,839
OTHER		15,866	27,261	307,689	246,867	450,857	2,997	6,502	63,701	50,693	89,393
Subtotal:-----		50,253	64,352	667,742	605,072	1,081,869	9,315	16,972	135,883	122,468	209,422
FCOJ(DEC)	KL										
BRAZIL		102,537	58,170	335,692	209,162	1,294,427	18,873	12,101	62,856	40,446	235,899
OTHER		21,830	39,308	41,693	79,168	220,694	5,181	9,585	9,608	19,110	52,557
Subtotal:-----		124,368	97,478	377,385	288,330	1,515,121	24,054	21,686	72,464	59,556	288,456
GRAPE JU(JAN)	KL										
EU 15		1,212	147	3,089	1,229	23,269	725	75	1,654	590	12,643
ITALY		1,001	147	2,563	1,229	12,156	628	75	1,375	590	6,471
SPAIN		147	0	392	0	10,898	76	0	223	0	6,017
BRAZIL		581	17	705	1,840	12,663	164	29	227	675	4,500
OTHER		627	1,040	2,214	3,678	30,935	408	367	959	1,166	9,537
Subtotal:-----		2,420	1,204	6,009	6,747	66,866	1,297	471	2,840	2,431	26,679
PNEAPL JUCN(JAN)	KL										
PHILIPPINES		10,163	11,684	19,318	22,170	95,904	1,733	1,600	3,702	2,975	15,324
THAILAND		10,919	14,762	26,723	29,507	92,632	1,912	2,506	4,953	4,971	14,423
OTHER		2,152	543	3,331	3,005	24,503	471	167	822	644	5,518
Subtotal:-----		23,234	26,989	49,372	54,681	213,039	4,116	4,273	9,477	8,590	35,265
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		3,269	5,157	9,301	7,619	43,380	1,032	1,623	3,267	2,335	12,278
THAILAND		759	629	1,289	1,841	10,030	623	514	1,074	1,400	8,176
OTHER		1,652	1,661	2,603	3,007	10,691	296	263	399	471	2,058
Subtotal:-----		5,680	7,447	13,193	12,467	64,101	1,951	2,400	4,740	4,207	22,511
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		1,259	4,175	2,437	7,726	17,926	1,153	3,923	2,345	7,703	17,210
OTHER		61	22	246	151	866	262	160	814	526	2,208
Subtotal:-----		1,320	4,196	2,683	7,877	18,792	1,415	4,083	3,159	8,229	19,418
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		2,108	3,489	6,721	8,073	9,782	2,836	5,556	9,021	15,705	13,004
OTHER		106	48	242	197	922	63	37	167	174	723
Subtotal:-----		2,214	3,537	6,963	8,270	10,704	2,899	5,593	9,188	15,879	13,727
FR CARROT(OCT)	MT										
CANADA		3,412	3,878	31,628	51,429	48,304	710	1,146	7,425	14,701	12,253
MEXICO		874	1,571	5,493	5,861	11,417	252	382	1,138	916	2,924
OTHER		20	37	102	79	373	8	25	55	43	256
Subtotal:-----		4,305	5,486	37,224	57,369	60,095	969	1,554	8,617	15,660	15,433
FR CABBAGE(OCT)	MT										
CANADA		616	1,259	6,609	14,084	12,282	139	358	1,573	3,862	3,022
MEXICO		536	992	2,706	4,052	5,481	101	190	445	781	942
OTHER		0	0	143	5	190	0	0	42	9	86
Subtotal:-----		1,152	2,251	9,458	18,141	17,953	239	547	2,060	4,651	4,049
FR CELERY(OCT)	MT										
MEXICO		1,897	6,954	4,674	12,084	8,224	529	3,376	1,400	5,941	2,250
CANADA		0	18	381	370	4,237	0	11	122	126	1,267
OTHER		0	18	60	31	60	0	24	19	48	24
Subtotal:-----		1,897	6,990	5,116	12,485	12,522	529	3,410	1,541	6,115	3,541
FR CUCMBR(OCT)	MT										
MEXICO		45,072	39,527	147,599	132,692	230,969	20,878	25,968	68,228	82,757	99,441
OTHER		6,624	3,002	12,720	9,969	20,004	1,296	790	3,355	3,075	7,461
Subtotal:-----		51,695	42,529	160,318	142,661	250,973	22,174	26,758	71,582	85,832	106,902
FR CAULFLWR(OCT)	MT										
CANADA		0	0	536	879	3,324	0	0	174	313	1,186
MEXICO		182	705	1,316	1,008	1,662	53	142	389	347	487
OTHER		0	5	0	10	0	0	2	0	6	0
Subtotal:-----		182	710	1,852	1,897	4,986	53	144	564	665	1,674
FR GARLIC(OCT)	MT										
MEXICO		40	108	150	145	10,289	18	103	166	246	10,397
CHINA, PEOPLES R		1,243	35	12,959	322	16,219	688	20	6,331	139	8,940
OTHER		1,338	1,551	2,105	4,658	4,609	1,694	2,102	2,520	6,518	5,490
Subtotal:-----		2,621	1,695	15,215	5,125	31,117	2,400	2,226	9,016	6,903	24,828
FR ONION(OCT)	MT										
MEXICO		18,388	19,717	60,706	57,241	180,514	15,677	9,898	47,584	50,981	108,275
OTHER		16,573	4,750	37,891	20,483	67,887	5,992	1,849	13,769	8,103	25,494
Subtotal:-----		34,960	24,467	98,597	77,725	248,401	21,668	11,747	61,354	59,084	133,769
FR PEPPERS(OCT)	MT										
MEXICO		26,060	35,806	76,759	92,701	143,889	24,714	41,290	76,661	112,871	137,306
EU 15		3	0	4,677	4,828	17,495	4	0	11,098	12,092	41,535
NETHERLANDS		0	0	4,530	4,632	17,046	0	0	10,659	11,539	40,236
OTHER		36	189	765	1,259	4,357	48	263	1,257	2,049	7,029
Subtotal:-----		26,099	35,994	82,203	98,788	165,740	24,766	41,553	89,016	127,012	185,870
FR SEED POT(OCT)	MT										
CANADA		12,588	12,297	29,460	30,663	106,339	2,497	2,203	5,290	5,152	21,734
OTHER		11	0	47	0	87	6	2	27	2	51
Subtotal:-----		12,599	12,297	29,506	30,664	106,426	2,502	2,205	5,317	5,155	21,785

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN  
MARKETING YEAR BEGINNING AS INDICATED  
FEB 95

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
<b>FRESH VEGETABLES</b>											
FR TBL POT(OCT)	MT	22,925	10,679	117,705	66,434	210,824	5,626	2,001	26,796	13,932	48,829
CANADA		0	0	38	20	59	0	0	18	14	31
OTHER		22,925	10,679	117,743	66,454	210,883	5,626	2,001	26,814	13,946	48,860
Subtotal:-----											
FR TOMATO(OCT)	MT	62,537	90,980	171,252	211,016	381,437	89,456	85,566	183,350	186,849	300,973
MEXICO		385	774	5,324	4,692	20,439	174	1,018	6,171	8,700	27,182
OTHER		62,922	91,755	176,577	215,708	401,876	89,630	86,584	189,520	195,549	328,155
Subtotal:-----											
FR ASPARG(OCT)	MT	3,757	6,861	7,454	11,215	18,201	6,634	11,883	13,260	20,845	29,098
MEXICO		50	83	4,302	5,896	6,694	91	109	5,884	8,871	9,728
PERU		0	19	2,088	2,691	2,817	0	38	2,074	2,979	3,003
OTHER		3,807	6,964	13,844	19,801	27,711	6,725	12,031	21,218	32,695	41,829
Subtotal:-----											
<b>CANNED VEGETABLES</b>											
CND TOM PST(JUL)	MT	0	0	193	609	28,428	0	0	129	427	18,343
MEXICO		39	72	949	1,142	5,786	28	60	651	900	4,827
CHILE		346	1,063	4,729	5,475	9,199	228	760	3,024	3,822	6,024
OTHER		384	1,134	5,871	7,226	43,412	257	819	3,804	5,149	29,193
Subtotal:-----											
CND TOM SAUCE(JUL)	MT	309	1,047	1,077	6,680	6,956	502	684	946	4,968	5,984
EU 15		238	60	238	4,305	5,574	457	204	457	3,740	5,152
SPAIN		480	1,103	3,350	3,839	4,507	304	707	2,118	2,691	2,959
CANADA		126	415	1,742	6,657	3,926	78	482	1,005	5,234	2,659
OTHER		914	2,565	6,169	17,175	15,390	884	1,873	4,069	12,893	11,602
Subtotal:-----											
CND TOMATO(JUL)	MT	36	841	5,417	10,625	11,194	20	348	2,650	4,857	5,358
CHILE		1,163	1,419	11,174	14,847	16,699	386	391	3,475	4,552	5,304
EU 15		1,146	1,383	10,985	14,760	16,403	380	380	3,407	4,525	5,200
ITALY		248	235	7,626	7,263	11,366	88	74	2,354	2,468	3,408
ISRAEL		281	227	2,979	863	4,426	157	113	1,489	434	2,215
OTHER		1,728	2,723	27,196	33,599	43,686	652	926	9,968	12,310	16,285
Subtotal:-----											
CND MSHROOM(JUL)	MT	1,713	2,715	9,815	10,611	18,168	2,195	4,886	16,490	19,309	28,859
CHINA, PEOPLES R		478	1,381	5,854	11,901	10,212	1,019	3,616	12,880	30,932	23,976
INDONESIA		1,395	299	6,244	3,383	12,407	2,301	640	10,353	7,719	22,900
HONG KONG		1,772	1,819	8,091	14,905	17,366	3,862	4,618	21,855	37,460	42,560
OTHER		5,358	6,214	30,004	40,800	58,153	9,377	13,760	61,578	95,420	118,295
Subtotal:-----											
<b>FROZEN VEGETABLES</b>											
FZN BROCLI(SEP)	MT	12,659	17,403	50,294	73,918	111,894	8,966	10,482	34,857	45,528	75,111
MEXICO		1,411	1,826	12,234	10,831	17,183	936	1,335	7,969	7,552	11,448
OTHER		14,070	19,229	62,529	84,749	129,077	9,901	11,817	42,825	53,080	86,559
Subtotal:-----											
FZN CAULFLR(SEP)	MT	3,429	2,130	23,530	20,689	26,053	2,826	1,559	20,853	13,205	22,679
MEXICO		378	216	1,938	1,793	2,946	172	143	911	1,197	1,522
OTHER		3,806	2,346	25,468	22,482	28,999	2,998	1,702	21,764	14,403	24,201
Subtotal:-----											
FZN POTATO(SEP)	MT	10,535	11,340	61,773	74,870	128,822	6,063	7,047	34,492	43,457	71,265
CANADA		73	4	176	116	258	42	14	152	132	280
OTHER		10,608	11,343	61,950	74,986	129,081	6,105	7,061	34,644	43,589	71,545
Subtotal:-----											
<b>TREE NUTS</b>											
PISTACHIO NSH(SEP)	MT	15	0	105	15	110	42	0	288	39	304
TURKEY		0	0	15	1	81	0	0	35	5	143
HONG KONG		0	0	0	68	0	0	0	1	113	1
OTHER		15	0	120	84	191	42	0	324	157	448
Subtotal:-----											
CASHEW NUT(AUG)	MT	2,794	2,303	22,557	20,913	40,026	11,673	9,662	94,112	90,310	170,332
INDIA		1,415	1,583	12,805	11,368	19,611	7,372	7,463	54,505	52,799	87,871
BRAZIL		574	232	2,637	2,188	4,804	1,879	995	8,940	9,286	18,104
OTHER		4,784	4,119	37,998	34,470	64,440	20,924	18,120	157,558	152,395	276,306
Subtotal:-----											
FILBERTS(AUG)	MT	251	460	2,402	2,242	3,360	929	1,713	7,578	8,407	11,711
TURKEY		3	15	91	185	196	16	42	263	551	763
OTHER		255	475	2,493	2,427	3,556	946	1,756	7,841	8,958	12,474
Subtotal:-----											
PECANS NSH(SEP)	MT	1,402	1,192	4,181	18,493	6,667	1,294	2,291	4,907	37,168	7,599
MEXICO		0	0	327	41	327	0	0	1,081	68	1,081
OTHER		1,402	1,192	4,508	18,534	6,994	1,294	2,291	5,988	37,236	8,680
Subtotal:-----											
<b>WINES</b>											
CHMP&SPRK WN(JAN)	KL	1,036	1,283	2,296	2,512	29,631	10,577	11,649	20,439	21,437	269,026
EU 15		407	438	821	786	10,246	8,097	8,366	14,159	14,271	185,494
FRANCE		330	502	869	1,124	11,131	1,318	1,941	3,884	4,824	49,372
ITALY		15	6	38	20	364	40	25	103	68	1,150
OTHER		1,051	1,289	2,334	2,532	29,995	10,617	11,674	20,542	21,504	270,176
Subtotal:-----											
FT&VERM WN(JAN)	KL	584	751	1,541	1,733	14,201	2,028	3,261	5,724	7,179	56,651
EU 15		340	386	848	945	8,087	748	1,000	2,039	2,448	19,802
ITALY		75	92	143	184	1,615	771	816	1,330	1,876	16,685
PORTUGAL		126	197	455	482	3,667	378	964	2,008	2,211	16,223
SPAIN		9	6	19	30	215	46	26	92	132	911
OTHER		593	757	1,560	1,764	14,417	2,074	3,286	5,817	7,311	57,562
Subtotal:-----											
OTH GP WINE(JAN)	KL	9,872	10,832	20,438	23,169	173,380	32,160	39,553	65,061	81,059	585,926
EU 15		3,560	3,500	6,636	7,686	58,150	17,587	20,735	32,359	40,540	293,182
FRANCE		4,881	5,641	10,868	12,001	91,466	11,057	13,901	25,144	30,688	223,717
ITALY		2,958	3,055	5,843	5,801	46,145	6,563	7,916	13,721	14,695	110,741
OTHER		12,830	13,887	26,281	28,971	219,533	38,723	47,469	78,782	95,754	696,680
Subtotal:-----											
OTH WN PROD(JAN)	KL	280	279	776	720	4,771	385	400	1,048	1,124	6,612
EU 15		129	102	281	228	1,598	531	474	1,000	1,043	6,210
JAPAN		205	130	432	267	3,301	225	115	507	255	4,303
CANADA		123	224	371	432	2,489	164	328	492	611	3,392
UNITED KINGDOM		72	22	193	147	1,018	124	46	357	271	2,003
OTHER		686	533	1,680	1,362	10,689	1,265	1,034	2,913	2,693	19,127
Subtotal:-----											
<b>CUT FLOWERS</b>											
ROSES(JAN)	NONE	0	0	0	0	0	13,667	17,259	22,989	25,746	90,891
COLOMBIA		0	0	0	0	0	7,712	9,384	10,278	13,429	34,773
OTHER		0	0	0	0	0	21,379	26,643	33,267	39,175	125,664
Subtotal:-----											
CARNATIONS(JAN)	NONE	0	0	0	0	0	6,943	8,256	15,291	17,366	88,240
COLOMBIA		0	0	0	0	0	246	298	382	546	2,408
OTHER		0	0	0	0	0	7,189	8,554	15,674	17,913	90,648
Subtotal:-----											

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